ORIMA

Independent Pricing and Regulatory Tribunal of NSW

2023 Point-to-Point Transport Survey Report

June 2023

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Quality and Compliance Statement

This project was conducted in accordance with the international quality standard ISO 20252, the international information security standard ISO 27001, as well as the Australian Privacy Principles contained in the Privacy Act 1988 (Cth). ORIMA Research also adheres to the Privacy (Market and Social Research) Code 2021 administered by the Australian Data and Insights Association (ADIA).

Acknowledgments

ORIMA pays respect to Aboriginal and Torres Strait Islander Peoples past and present, their cultures and traditions and acknowledges their continuing connection to land, sea and community.

We would also like to acknowledge and thank all the participants who were involved in our research for their valuable contribution.

Contents

Appendices

1. Executive Summary

Source of data: The 2023 IPART Point-to-Point Transport Survey is the sixth annual survey using a revised and updated questionnaire. Three independent samples are used, one for Sydney (n=2,030 respondents), one for 'other urban' areas (n=530) and one for the rest of NSW (n=416). The previous survey was delayed from late 2021 to March 2022 due to the impact of COVID-19 restrictions, and the 2023 survey matched the March-April data collection timing. The questionnaire captures equivalent data for taxis, rideshare and limousines / other hire vehicles. The post-2018 samples are all structured and weighted to match as closely as possible the 2017 sample in order to maximise comparability across waves.

Overview of key results

The COVID-19 pandemic significantly disrupted the NSW point-to-point transport industry, but **the 2023 survey suggests that operations are returning to approximately pre-COVID levels**. There appear to be **two broad dynamics influencing the industry** at present. The impact of and recovery from COVID dominates the last three years, but there is a longer-term structural change due to the emergence and maturing of rideshare in different markets that overlays the pre-COVID, COVID-affected and current survey results.

The combined impact of these two dynamics is best seen in overall use of taxis and rideshare. The past two surveys showed a very substantial initial decline in the use of point-to-point transport in 2020, with the decline in use of taxis considerably sharper than the decline in use of rideshare. Use of both services increased from 2020 to 2022, but remained below 2019 levels. **In 2023 use of rideshare is at equal or higher levels than in 2019 in all regions, while use of taxis is at equal or slightly lower levels**. This suggests that the impact of COVID did not substantively disrupt that longer-term dynamic, which has seen rideshare surpass use of taxis in Sydney and match their use in other urban areas.

The two COVID-affected surveys in 2020 and 2022 suggested **perceptions of the services and their respective patterns of use changed less in response to COVID than the absolute volume**. For example, as seen before COVID, rideshare use tends to be more focussed on social travel on weekends, while taxis are more used for other purposes and more evenly through the week. However, after more than two years of COVID impact, as the market moves into a new phase this current status quo may now include some forced or evolved responses to COVID that have become habitual (for example, when customers cannot get a taxi they are somewhat more likely to not make the trip at all than when customers cannot get a rideshare).

There is also a **suggestion in the survey that taxi users are somewhat more conservative or risk-averse than are rideshare users**. By comparison, taxi users were more likely to have worn a mask on their last trip, were a little more likely to want drivers to wear masks, and reported a bigger negative impact on their confidence to use the service due to COVID.

Overall, the point-to-point transport system appears to be largely meeting the needs (or expectations) of the NSW community. The proportion of the community reporting failed trips or other problems is increasing slightly (especially for rideshare), but overall only small proportions of the community are dissatisfied with the services available to them, and satisfaction with the last trip remains at over 80% for all services in all regions. Dissatisfaction with taxis remains slightly higher than with rideshare.

It is likely that demand for point-to-point transport will continue to rise in the short-term. The negative impact of COVID on expectations of using point-to-point transport are waning, on balance users of point-to-point transport say the experience of their last trip makes them somewhat more likely to use the service again, and fewer people report having a preference to not use point-to-point transport at all.

The current survey suggests the larger dynamic of the emergence and then maturity of rideshare in different markets is continuing. **In Sydney and other urban areas there are indications that some of the key advantages rideshare is perceived to have are now diminishing** – though this does not yet show up in overall perceptions of the services. Rideshare users report increasing numbers of failed trips and other problems, waiting times becoming a little longer, and fares being slightly less value. Over time it might be expected that these experiences will influence perceptions and preferences, but so far this is not the case. **In the rest of NSW there is suggestions that rideshare's emergence continues,** with perceptions of greater availability and convenience.

2. Introduction

A. Background

The Independent Pricing and Regulatory Tribunal (IPART) provides independent regulatory decisions to balance the rights and needs of NSW citizens, taxpayers and service providers. Taxi services have long been among the services IPART contributes to the regulatory environment for. Recent years have seen dramatic changes to the point-to-point transport services environment in which taxis operate, in particular the rapid emergence of rideshare and other hire vehicle categories.

Since 2012 IPART has conducted regular surveys of NSW residents on their experiences, as well as their reasons for using point-to-point transport options. The 2017 survey was timed to run just prior to changes to the regulation of taxis and other point-to-point transport services that came into effect on 1 November 2017. With the changes in landscape and regulations, the 2017 survey took the opportunity to substantially revise the questionnaire to better reflect the current and anticipated short-to-medium term context, in particular adopting an approach of having parallel questions for taxis, rideshare and 'limousines and other hire vehicles' to maximise the consistency and comparability of data across these different services. Throughout the report, the results from the different transport services are now reported in parallel.

Where possible, questions in the new survey retained consistency with previous questions to allow some ongoing tracking. However, 2017 was seen as the opportune time to update the questionnaire to best suit the current situation, and in most cases future relevance was given priority over continuity. To aid calibration of the new method to the historical data, a small concurrent survey utilising the previous method was also conducted. See appendix F for details

After the substantial changes in 2017, the 2018 survey placed the primary emphasis on methodological consistency to maximise comparability and sensitivity to any changes since the previous year. A virtually identical questionnaire and source of data were used in 2018, and then no substantive changes were made at all from 2018-2023. This allows the focus of the reporting to be on updating results and identifying any changes over time.

While the 2020 survey kept an identical method and questionnaire, like all things the survey needed to be contextualised to the COVID-19 pandemic. Additional items were added to a number of existing survey questions in 2020 to pick up the extent to which COVID was a new factor in the use of point-to-point transport, and a number of additional explicit COVID questions were included.

Due to the impact of COVID-19 lockdowns in late 2021, the usual October-November timing of the planned 2021 survey was delayed until March 2022. The 2023 survey has retained similar timing, being conducted in March and April 2023. The survey content and methodology remain identical to 2017-2020 in all ways other than the timing. Most years a small number of relevant non-core questions are also included at the very end of the survey.

B. Research objectives

The purpose of the survey is to collect data on NSW residents' experiences with and perceptions of point-to-point transport service options.

Specific objectives are to measure:

- Awareness of transport options available in their location
- Usage of transport services, including change in usage in the last 12 months
    - Impact of use of hire vehicles on use of taxis
- Satisfaction with the available transport services
- Incidence of problems trying to use transport services, and alternatives used as a result
- Methods used to obtain point-to-point transport services
- Perceived value for money
    - Possible impact of minimum rank and hail taxi fares
- Perceived reasonableness of waiting times
- Workplace policies towards point-to-point transport options
- Detailed information about the last trip undertaken
- Perceptions of the strengths and weaknesses of different service options
- Preferences for different service options
- Awareness of the impending regulatory changes.

An additional objective in 2020 and 2022 was to understand the effect of COVID on use of point-to-point transport – both overall, and relatively across the different types of transport choice available. These questions were mostly removed in 2023, though some remain where relevant.

C. Methodology

The 2023 methodology was identical to those used since 2017. The survey was administered online to a total of 2,976 NSW residents between 29 March and 18 April 2023 (including a brief pause to examine and confirm pilot data). This timing was 12 months after the previous survey, which was postponed from the usual October-November timing in 2021 until March 2022 due to the impact of COVID-19 restrictions in later 2021.

Three independent samples were obtained:

1. Sydney n=2,030
2. Other Urban (Newcastle, Wollongong, Gosford and Wyong) n=530
3. Rest of NSW n=416

As in the past five survey waves, respondents were all members of the ORU online research panel. Panel members are recruited via a combination of online and offline methods to maximise representativeness, and all incentives provided for participation are sent to physical addresses to ensure geographic correctness.

Interlocking age and gender quotas were applied at the time of data collection to match ABS population proportions. In 2017 all age by gender cells were within 1% of the target quota with the exception of 16-29 year old males in the Other Urban sample (who were slightly under sampled), and no weighting was applied to the data for analysis due to its close alignment with the target profiles. The same base sample structure has since been applied each survey, but slight variations in exact respondent numbers are always observed. To completely maximise comparability to the 2017 benchmarks, data in later surveys is weighted to exactly match the 2017 sample proportions.

The base questionnaire was developed in 2017 by ORIMA Research in collaboration with IPART. This drew on the previous questionnaire where possible, while updating the content and format to better suit the operational balance of taxis and hire vehicles in NSW. The 2018 questionnaire updated codeframes in several questions to reflect answers in 2017, and collect additional detail for some questions (eg: pick up and set down locations). The 2019-20 surveys only updated changed provider names, but in all substantive aspects remain identical to 2018.

The 2023 survey again reviewed rideshare and carshare provider names to suit the current marketplace. To respond to the COVID context, additional COVID response options were added to some questions in 2020 (eg: reasons for changing use of transport options), and several other additional new COVID-specific questions were included to measure explicit impacts of COVID on customer choices. These questions were retained for 2022, but a number were dropped in 2023 where no longer relevant.

A copy of the questionnaire can be seen in Appendix A.

The questionnaire takes an average of 12 minutes for respondents to complete.

Demographic details of the sample can be seen in Appendix B.

Note that throughout the report where sample sizes drop below a minimum threshold of n=30 for any subsample, these results are shown in grey or semi-transparent form. These results should be interpreted with caution as being indicative only.

Comparisons to data prior to the 2017 benchmarks should be made with caution due to the substantial change in methodology.

3. Main Survey Findings

Definitions

This report refers to three geographic regions and three types of point-to-point transport services. Each of these has a distinct colour associated with it, used consistently in tables and charts to identify which area and service results relate to more easily.

Geographic areas

	Sydney	Metropolitan Sydney
	Other Urban	Newcastle, Wollongong, Gosford, Wyong
	Rest of NSW	All other areas of NSW outside Sydney and the other urban centres

Point-to-point transport services

	Taxis	A vehicle clearly marked as a taxi and with a TAXI sign on its roof – refers to rank & hail and booked taxis unless otherwise specified.
	Hire Vehicles	Hire vehicle services provide a vehicle with a driver to transport you from one point to another for the payment of a fare
	Rideshare	Rideshare services like Uber, Shebah, Ola or Didi
	Limousines or other hire vehicles	Other hire car services with a driver

Note: Throughout the main body of the report there are tracking charts showing changes in key measures across multiple surveys. Many of these show just the directly comparable 2017-2022 data, but where suitably comparable data from earlier surveys exists this is also shown. Full data tables for the tracking charts can be seen in Appendix E.

A. Local Transport Services

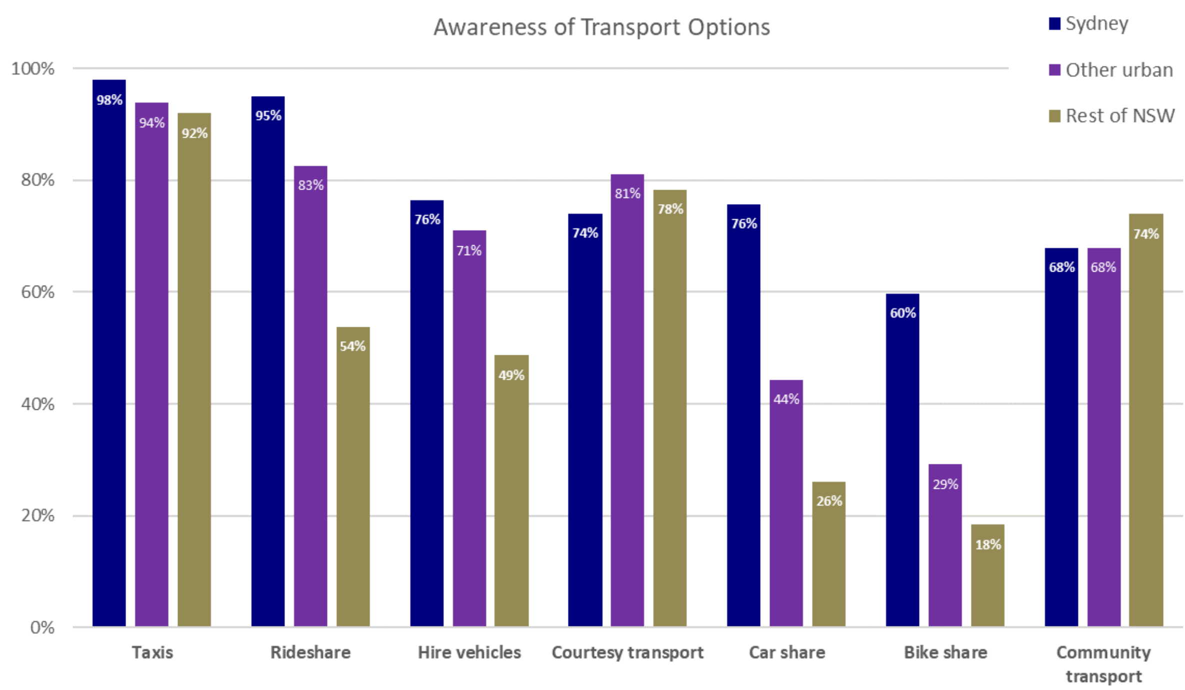
Awareness and Use

Awareness of available point-to-point transport services has not substantively changed in the last 12 months, and trends across all services and locations are fairly flat since 2020. If anything, there was a slightly higher reported awareness of rideshare being available outside of Sydney, but these are not statistically significant differences.

More than 90% of respondents in all three locations reported being aware of taxis operating in their area. Within Sydney awareness of rideshare services operating have been effectively at the same near-complete level as taxis since 2018. Considerably fewer respondents from other urban areas (83%) and from the rest of NSW (54%) were aware of rideshare services in their location.

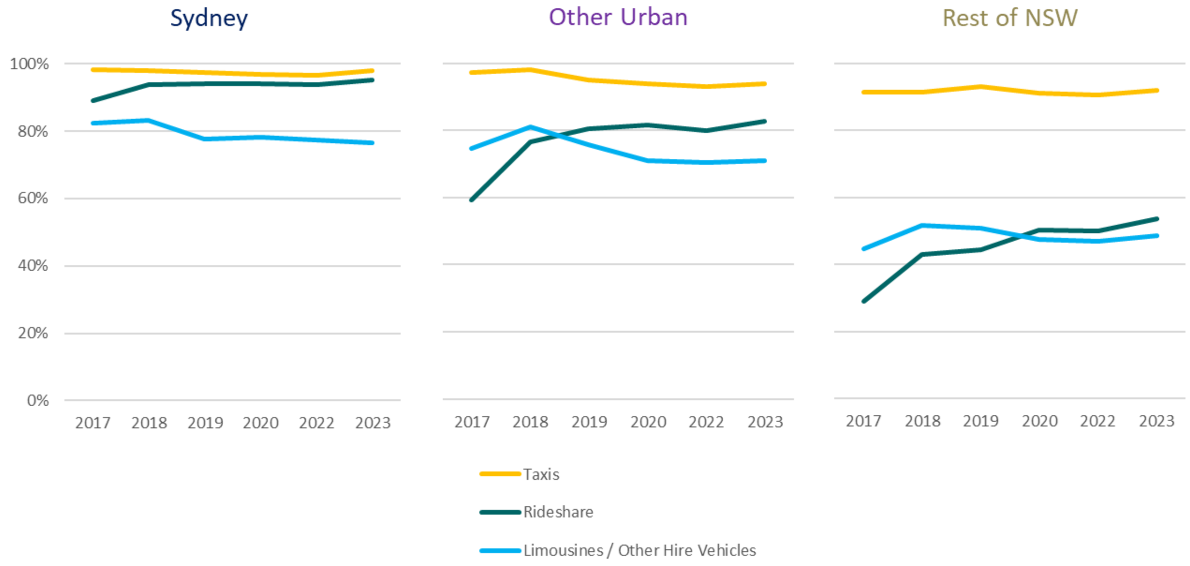
Reported awareness of rideshare services had apparently plateaued in all areas from 2020 to 2022, with only a slight upwards movement in the rest of NSW evident in that time. It is not clear from the current results alone whether the slightly higher 2023 rideshare figures reflects a return to increasing awareness or whether they are just an isolated fluctuation.

Figure 1: Awareness of point-to-point transport services in their location Q5/8/11



Base = all respondents [Sydney n=2,030; Other Urban n=530; Rest of NSW n=416]

Figure 2: Change in awareness of point-to-point transport services in their location Q5/8/11



The six waves of the updated survey since 2017 have shown a significant change in **relative usage** of taxis and rideshare. The impact of COVID-19 can also be clearly seen in the **absolute usage** of both services, and point-to-point transport generally (see next page).

In 2017 taxi usage was much higher than rideshare in all locations. Across 2018 and 2019 rideshare usage increased, especially in Sydney and other urban areas, where it reached or nearly reached parity with taxi usage, which had declined a little in both locations. In the rest of NSW, where awareness and availability of rideshare remained much lower, the earlier status quo between the two services remained.

In 2020 the impact of COVID-19 significantly disrupted the patterns. However, with three years' data since the impact of COVID-19, the continuing relative trajectories of the two main point-to-point transport services can still be seen. In 2020 COVID-19 impacted taxis more than rideshare, which declined to a much smaller extent, with rideshare being more used than taxis in Sydney for the first time. Since 2020 reported usage in the last six months of the two services had paralleled each other in both Sydney and other urban areas – but at the 'new' relative levels seen in 2020. This pattern suggests that *relative* usage of the two services has settled after the disruption of COVID-19.

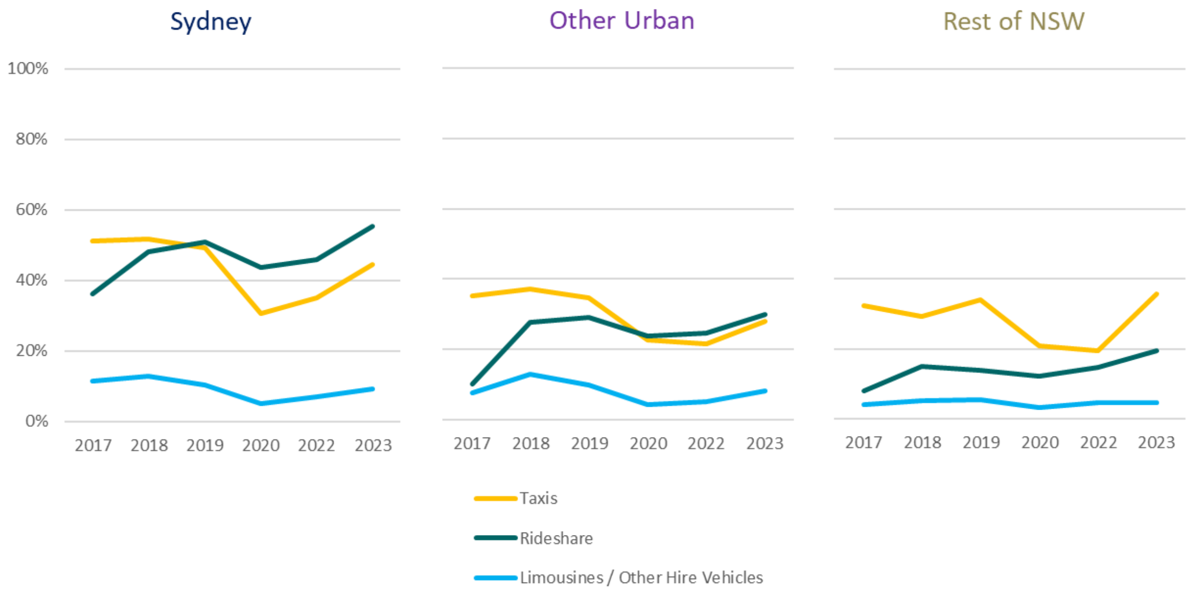
In Sydney, 11%-13% more respondents reported using rideshare than taxis in the six months prior to the survey for each of the last three surveys, while the relative figures have been effectively equivalent in other urban areas in that timeframe. In the rest of NSW the sharply lower taxi use in 2020 and 2022 coincided with only slightly higher reported use than for rideshare. However, in 2023 taxi use increased more sharply than rideshare use, and remains the dominant service.

From an absolute usage perspective, usage of both services increased a little from 2020 to 2022, and then more so again from 2022 to 2023. For rideshare, reported use is at equal or higher levels than was reported in 2019 in Sydney (55% compared to 51%), other urban areas (30% vs 29%) and the rest of NSW (19% vs 14%). For taxis, reported use in 2023 is *below* 2019 levels in Sydney (44% vs 49%) and other urban areas (28% vs 35%), and at similar levels in the rest of NSW (36% vs 34%).

Figure 3: Usage of point-to-point transport services in the last 6 months among all respondents and among those aware of the service in their area Q6/9

Use in the last 6 months		Taxis			Rideshare services			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Used in the last 6 months (Base = **all respondents**)	**2023**	**44%**	**28%**	**36%**	**55%**	**30%**	**19%**	**9%**	**8%**	**5%**
	Sample size	*2,030*	*530*	*416*	*2,030*	*530*	*416*	*2,030*	*530*	*416*
	2022	35%	21%	20%	46%	25%	15%	7%	5%	5%
	Sample size	*2,070*	*541*	*412*	*2,070*	*541*	*412*	*2,070*	*541*	*412*
	2020	31%	23%	21%	44%	24%	12%	5%	4%	3%
	Sample size	*2,026*	*508*	*407*	*2,026*	*508*	*407*	*2,026*	*508*	*407*
	2019	49%	35%	34%	51%	29%	14%	10%	10%	6%
	Sample size	*2,095*	*522*	*446*	*2,095*	*522*	*446*	*2,095*	*522*	*446*
	2018	52%	37%	29%	48%	28%	15%	13%	13%	5%
	Sample size	*2,147*	*533*	*478*	*2,147*	*533*	*478*	*2,147*	*533*	*478*
	2017	51%	35%	32%	36%	10%	8%	11%	8%	4%
	Sample size	*2,048*	*501*	*453*	*2,048*	*501*	*453*	*2,048*	*501*	*453*
Used in the last 6 months (Base = **aware of service**)	**2023**	**45%**	**30%**	**39%**	**58%**	**36%**	**36%**	**12%**	**11%**	**10%**
	Sample size	*1,989*	*498*	*384*	*1,927*	*439*	*214*	*1,588*	*373*	*206*
	2022	36%	23%	22%	49%	31%	29%	9%	7%	10%
	Sample size	*2,003*	*509*	*371*	*1,935*	*420*	*194*	*1,624*	*388*	*191*
	2020	32%	24%	23%	46%	29%	24%	7%	6%	7%
	Sample size	*1,962*	*480*	*378*	*1,909*	*400*	*191*	*1,589*	*373*	*203*
	2019	51%	36%	37%	54%	36%	31%	13%	13%	11%
	Sample size	*2,040*	*499*	*416*	*1,968*	*420*	*191*	*1,626*	*399*	*233*
	2018	53%	38%	32%	51%	36%	35%	15%	16%	10%
	Sample size	*2,103*	*523*	*439*	*2,015*	*406*	*193*	*1,781*	*432*	*247*
	2017	52%	36%	35%	41%	17%	27%	14%	10%	9%
	Sample size	*2,009*	*487*	*415*	*1,825*	*297*	*131*	*1,686*	*374*	*202*

Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9



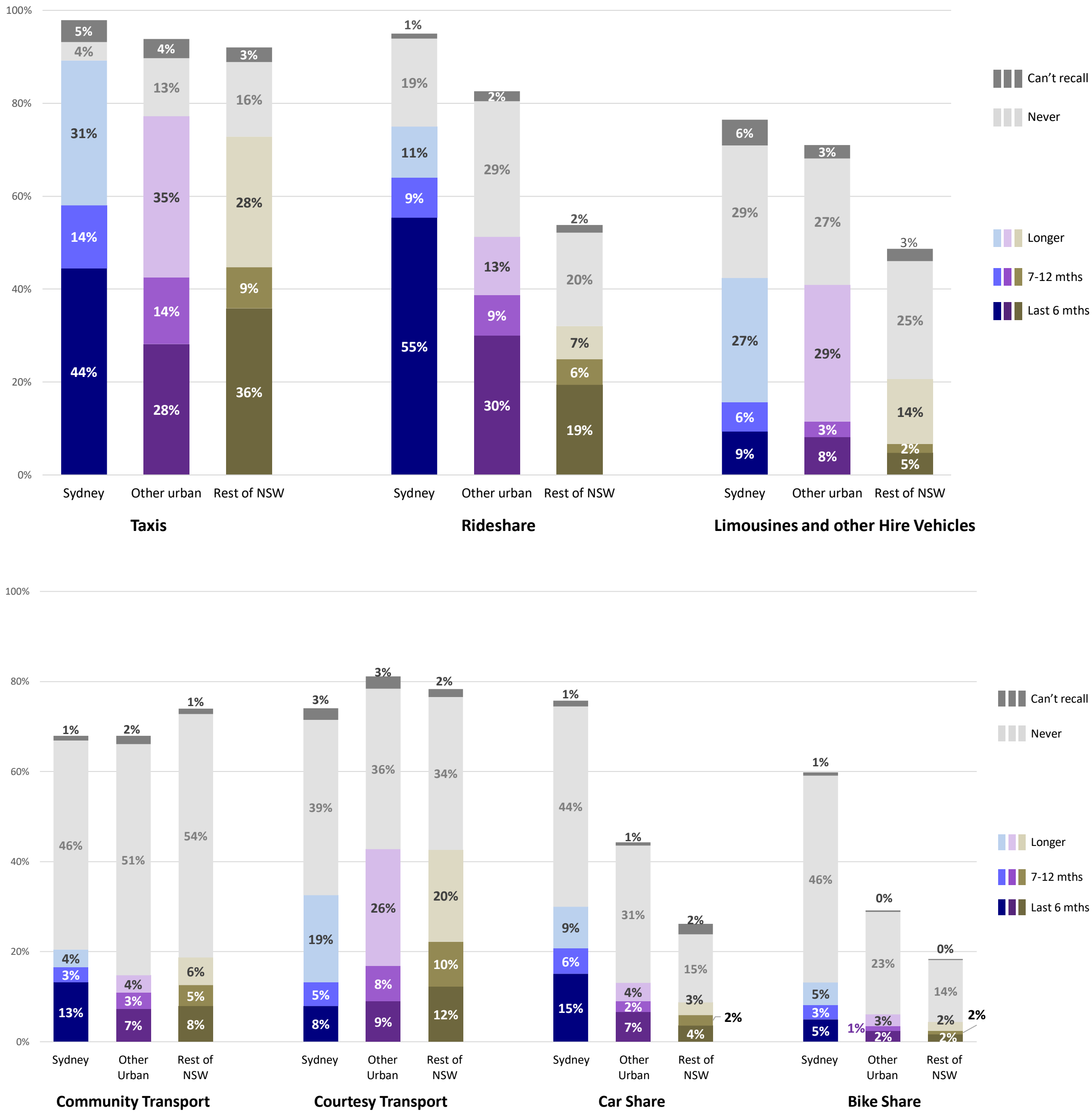
A more detailed breakdown of usage also shows a similar pattern. In Sydney 58% of respondents had used a taxi in the last 12 months, bouncing back from 46% in the 2022 survey and 51% in 2020 to be close to the 63% seen in 2019. By comparison 64% reported using a rideshare in the last 12 months, up from a fairly steady figure in the mid-50s seen since 2019.

Similar patterns are seen in other urban areas and the rest of NSW. In both locations there are much larger proportions of respondents who last used taxis more than 12 months ago (35% and 28% respectively) than who have previously but not recently used rideshare (13% and 7%).

The proportion of people who were aware of taxi and rideshare services being available but who have never used them is minimally changed since the 2020 survey, but if anything slightly smaller.

Reported use of limousines and other hire vehicles is similar to or slightly higher than seen in 2020.

Figure 5: Breakdown of usage of point-to-point transport services Q6/9/12



Base = all respondents [Sydney n=2,030; Other Urban n=530; Rest of NSW n=416]

Frequency of Use

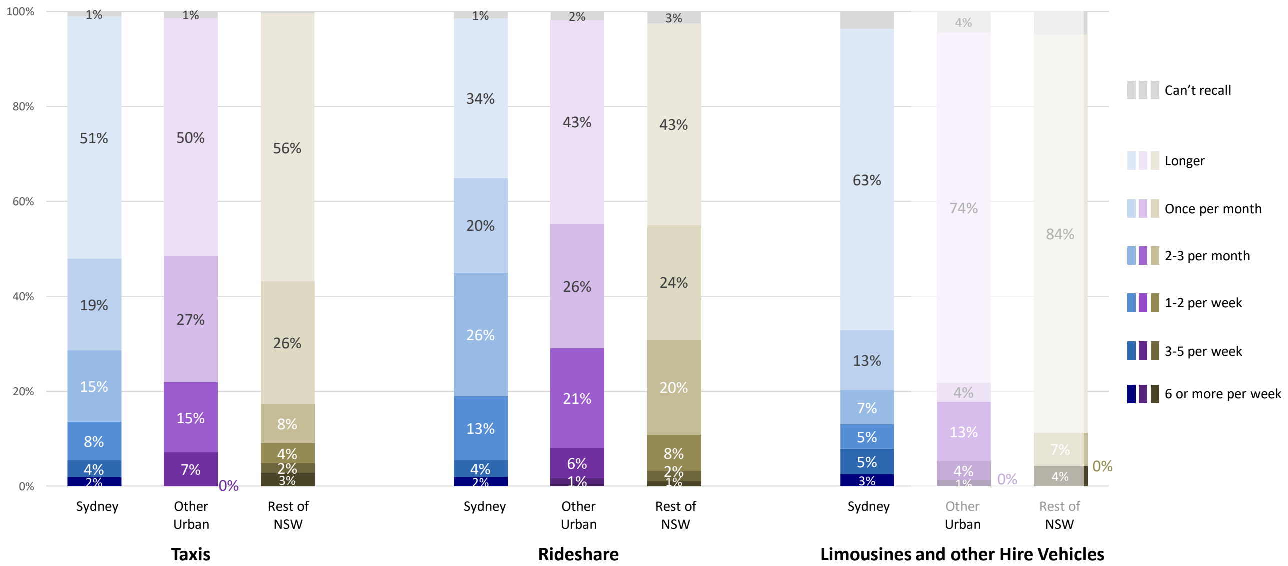
The chart and table below show the breakdown only of those respondents who had used taxis or hire vehicles in the last 6 months.

This has consistently shown rideshare to have generally the highest-frequency users, to a small extent on a weekly basis, and to a much higher extent on a monthly basis. In Sydney 19% of respondents who had used rideshare in the last six months did so at least weekly, and 65% did so at least monthly. The equivalent figures for taxis were 14% and 48%. In other urban areas and the rest of NSW there was little difference at the weekly level, but 7% to 12% differences on a monthly basis.

COVID-19 appeared to create a spike in more frequent use of limousine and other hire vehicles, which has largely reverted to more normal levels in 2023.

Figure 6: Frequency of using point-to-point transport services among service users Q13

Base = used in the last 6 months



Base = Used service in the last 6 months [See sample sizes in table]

Frequency of use in the last 6 months	Taxis			Rideshare services			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Proportion used in last 6 months	**44%**	**28%**	**36%**	**55%**	**30%**	**19%**	**9%**	**8%**	**5%**
Sample size (base = used in last 6 months)	*874*	*152*	*138*	*1034*	*168*	*67*	*183*	*44*	*18*
6 or more times per week	2%	0%	3%	2%	0%	1%	3%	1%	4%
3-5 times per week	4%	0%	2%	4%	1%	2%	5%	0%	0%
1-2 times per week	8%	7%	4%	13%	6%	8%	5%	4%	0%
At least weekly	**14%**	**7%**	**9%**	**19%**	**8%**	**11%**	**13%**	**5%**	**4%**
2-3 times per month	15%	15%	8%	26%	21%	20%	7%	13%	7%
Once every month	19%	27%	26%	20%	26%	24%	13%	4%	0%
At least monthly	**48%**	**48%**	**43%**	**65%**	**55%**	**55%**	**33%**	**22%**	**11%**
Less often	51%	50%	56%	34%	43%	43%	63%	74%	84%
Can't recall	1%	1%	0%	1%	2%	3%	4%	4%	5%

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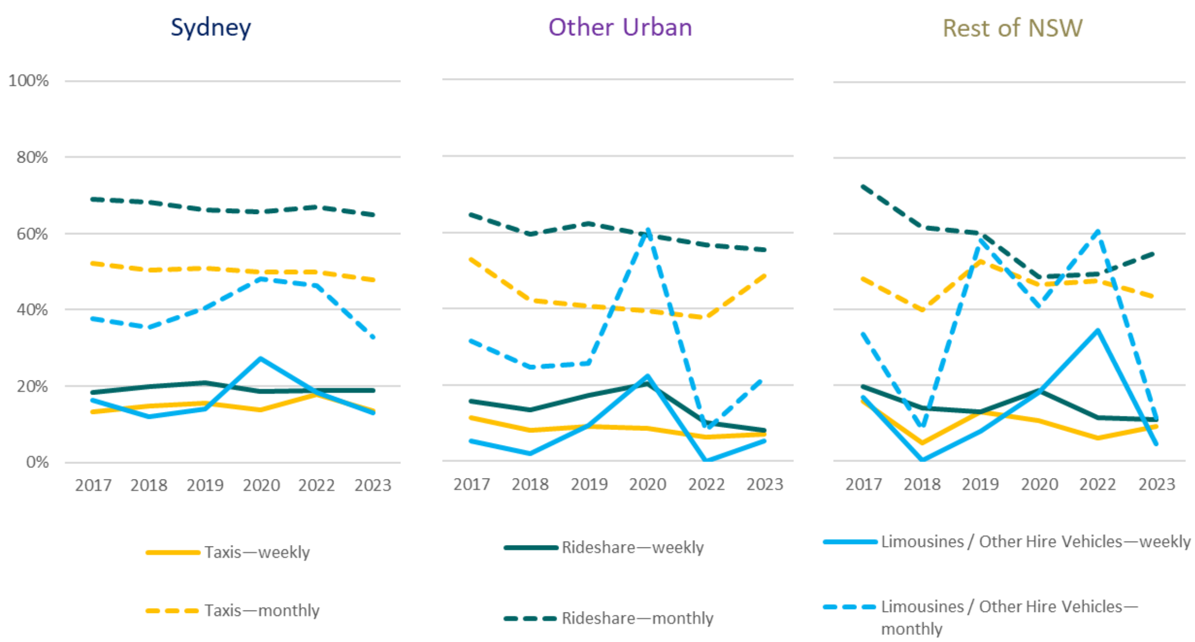
Tracking the frequency of use since 2017 shows that the tendency for rideshare users to be more active on a weekly or monthly basis has been consistent across this timeframe.

The Sydney chart shows that other than when users of taxis and rideshare were about equally likely to use them weekly in early 2022, in all other surveys users of rideshare reported slightly higher levels of weekly use. Rideshare users have always been substantially more likely than taxi users to do so on a monthly basis.

In other urban areas a similar pattern has generally been observed, other than in the current survey when there was relatively little difference in the frequency of use of taxi users compared to rideshare users on both a weekly and a monthly basis. Whether this is an anomaly or reflects a change in behavioural patterns in these areas will require future surveys to determine.

Although sample sizes are small, the tracking charts suggest that users of limousines and other hire vehicles may have made more frequent use of these services during COVID-19, but this seems to have reverted to more usual levels in 2023. Overall, users of these services tend to do so somewhat less frequently, likely reflecting the higher level of formality often associated with these types of services.

Figure 7: Change in frequency of using point-to-point transport services among service users Q13
Base = used in the last 6 months



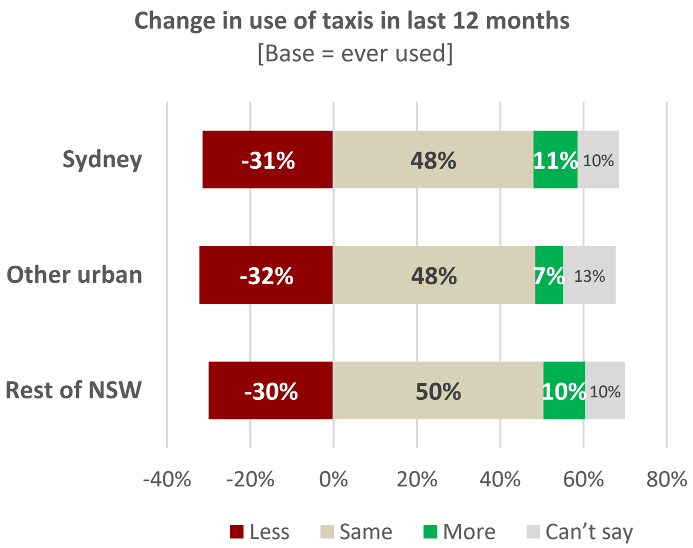
Note: Small sample sizes apply to the use of limousines and other hire vehicles (especially in the Rest of NSW sample), which largely accounts for the high degree of variability seen in that track.

Changes in Usage

Compared to the previous 12 months

As is seen in several measures of usage in this survey, there are two different dynamics at play when looking at individual users' self-perceived changing use of point-to-point transport. The longer-term dynamic is greater perceived use of rideshare and declining use of taxis and of limousines and other hire vehicles. The more acute dynamic is the recovery in 2023 from the dramatic decline in 2020 triggered by COVID-19. Both these patterns can be clearly seen in the tracking charts (see next page). In all areas, prior to COVID-19 a nett increase in perceived rideshare use was seen, and a nett decline in use of the other services. With the impact of COVID-19 nett use of all services was negative in 2020 and 2022. In 2023 usage patterns have all moved back from their lows – but the discrepancies between services are still clearly visible.

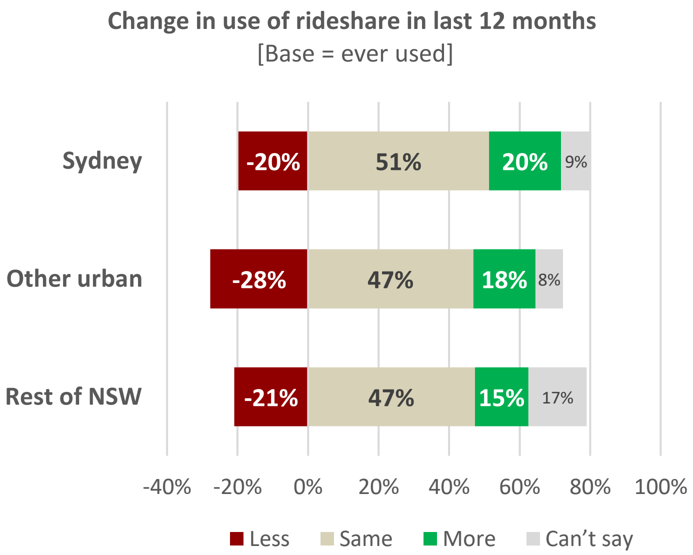
Figure 8: Change in use of transport services in the last 12 months amongst those who have ever used transport services Q16



Base = Ever used each transport type [Sydney n=1,810; Other Urban n=408; Rest of NSW n=302]

Amongst people who had ever used taxis, there was a continuing high level of nett perceived decline – and in 2023 this has largely returned to pre-COVID levels (as seen in 2019).

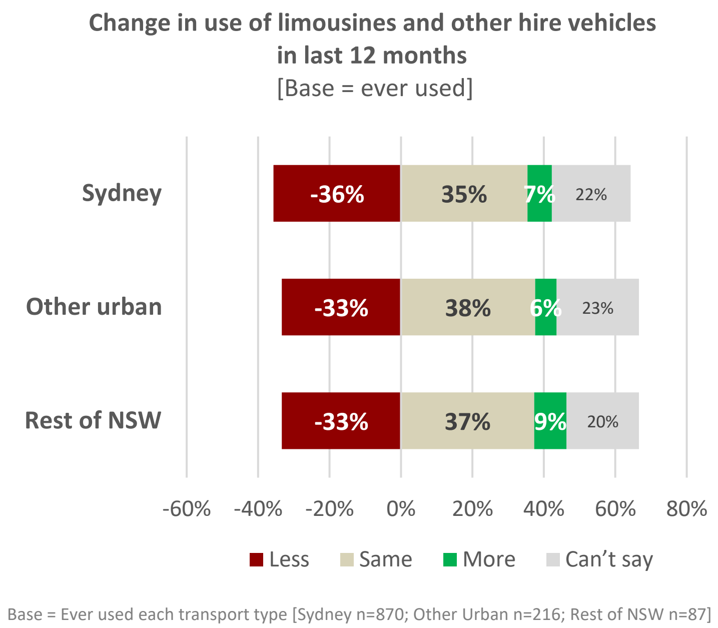
The **nett decline** in Sydney was -20% (31% indicated they used taxis less, compared to 11% who felt they used them more). This is down from -50% in 2020, and similar to the -26% seen in 2019. The nett decline in other urban areas was -25% (compared to -27% in 2019), and in the rest of NSW was -20% (the same as weas seen in 2019).



Base = Ever used each transport type [Sydney n=1,443; Other Urban n=278; Rest of NSW n=120]

Amongst people who had ever used rideshare, pre-COVID surveys had consistently shown a nett positive movement. However, in 2020 and 2022 rideshare also showed nett declines in use.

In 2023, rideshare users continued to report a perceived slight **nett decline** compared to the previous 12 months, though much smaller than for taxis. The nett change in Sydney was 0% (compared to -18% in 2020, but +22% in 2019), -10% in other urban areas (compared to +21% in 2019) and -6% in the rest of NSW (compared to +1% in 2019).

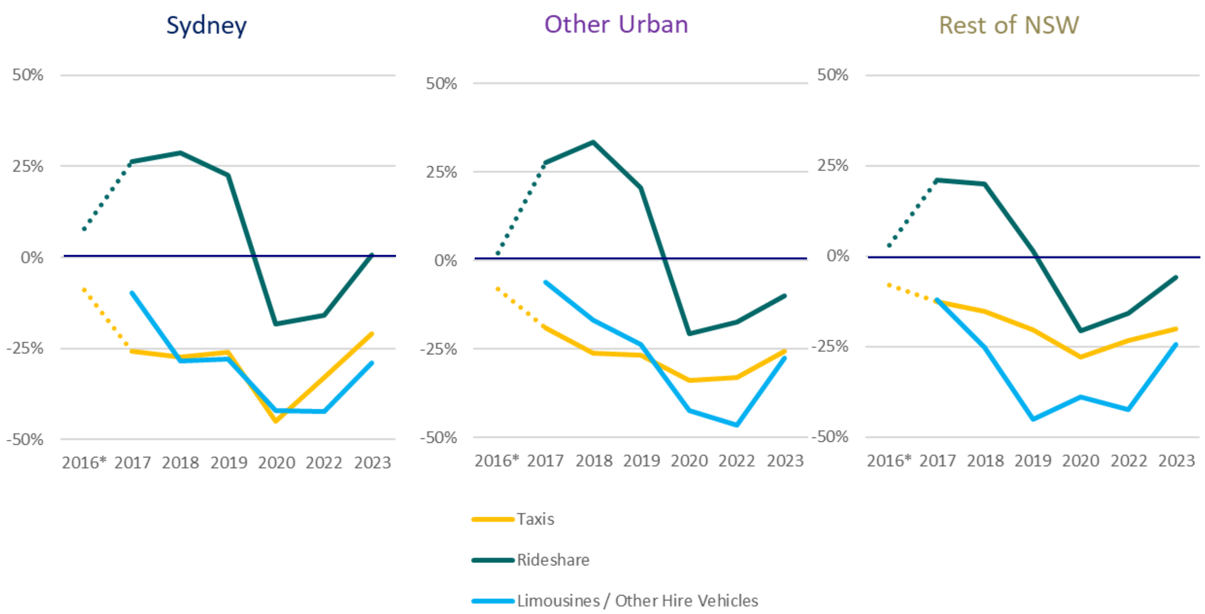


Much like taxis, respondents who have ever used limousines or other hire vehicles have also perceived their use to be declining, with a **nett decline** seen in all previous surveys – both before and after the intervention of COVID-19.

Also like taxis, the nett negative differentials were generally much larger in 2020 and remained that way in 2022 before returning to approximately 2019 levels in 2023. The nett declines of -29% in Sydney and -27% in other urban areas are both within 3 percentage points of what was observed in 2019. The -24% seen in the rest of NSW returns to a level previously seen in 2018, due to an atypical ('pre-COVID') decline seen in 2019.

Figure 9: Rate of change in use of transport services in the last 12 months amongst those who have ever used transport services. Q16

Chart shows nett differential (i.e: % reported an increase in use minus the proportion who reported a decrease in use)



Note: Small sample sizes apply to the use of limousines and other hire vehicles in the Rest of NSW sample, which largely accounts for the high degree of variability seen in that track.

Reasons for changes in use

Compared to 2020 and 2022, more respondents had **increased their use of point-to-point transport** in the last 12 months, though sample sizes outside of Sydney remain very small and should be treated with caution. Overall, going out more / needing to get around more was one of the main reasons cited by those who had. For those who used rideshare more, shorter waiting times and fare estimates were also common reasons for using them more. Looking at the long-term trends in reasons for using taxis more in Sydney (top table, next page), 'going out more' has been a constant reason. The proportion who cite 'less access to alternatives' has shown the biggest change over time, declining from the second biggest reason until 2016 to now be on the edge of the top 5.

Figure 10: Reasons for using transport services more in the last 12 months Q18

NOTE: Small bases sizes. Interpret grey numbers with caution

Reasons why transport services have been used more in the last 12 months	Taxis			Rideshare services			Limousines or other hire vehicles		
Base = used service more in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*181*	*29*	*28*	*283*	*50*	*18*	*55*	*13*	*8*
I find them **less expensive** than before	21%	3%	9%	24%	**35%**	**62%**	18%	15%	**25%**
I have **more disposable income**	10%	9%	10%	11%	2%	4%	13%	0%	0%
I'm **going out more** / needing to get around more	**31%**	**30%**	5%	**41%**	**36%**	**42%**	**25%**	9%	**26%**
Because I **don't have to wait as long** to catch one, or I think one is **more likely to turn up** after I have booked it	17%	11%	6%	**27%**	**28%**	**47%**	20%	7%	8%
I have **less access to alternatives**	15%	17%	16%	9%	7%	5%	6%	6%	0%
Because the service for **booking taxis over the phone has improved**	8%	0%	**28%**						
Because it has become **easier to book taxis with apps** than it was	19%	9%	8%						
Because the **service for booking is better** than it used to be				17%	24%	23%	11%	0%	11%
I think drivers have become **less inclined to take longer routes or overcharge** me	9%	14%	14%	7%	9%	10%	14%	0%	0%
Because I get a **fare estimate quoted** in advance	14%	7%	11%	**38%**	**44%**	**69%**	18%	14%	0%
I have found that **driver behaviour and knowledge** has improved in [my location]	9%	0%	8%	9%	0%	15%	11%	0%	0%
Because they were **not available previously** or I **did not know** about them before then	5%	4%	6%	4%	12%	0%	10%	9%	16%
Because of things related to **COVID**	17%	19%	3%	13%	6%	8%	18%	21%	0%
For **another reason**	23%	**32%**	**46%**	11%	13%	5%	18%	**33%**	14%

Bold figures = 25%+ of respondent group. Green cells = top 3 reasons in Sydney. Note small base sizes in some cases.

NOTES: Note low n values for Rest of NSW and Other Urban.
Data filtered only if used taxi in past 6 months pre-Nov 2017

Why have you used taxis to get around more?

Sydney	Nov 13	Feb 14	Nov 14	Feb 15	Nov 15	Feb 16	Nov 16	Feb 17	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Mar 23
Sample size:	335	292	333	302	351	323	296	305	156	177	151	87	146	180
Less expensive	8%	11%	12%	10%	17%	23%	18%	17%	13%	**15%**	**22%**	**25%**	**23%**	**21%**
More disposable income	19%	16%	16%	14%	21%	22%	17%	14%	**14%**	12%	17%	12%	14%	10%
Going out more	**39%**	**43%**	**40%**	**39%**	**38%**	**37%**	**41%**	**32%**	**28%**	**29%**	**20%**	**21%**	**29%**	**31%**
Don't have to wait as long	18%	18%	17%	17%	20%	20%	**27%**	**23%**	13%	**19%**	**19%**	**20%**	**20%**	17%
Less access to alternatives	**31%**	**27%**	**27%**	**25%**	**30%**	**29%**	24%	**23%**	12%	11%	11%	15%	14%	15%
Phone booking has improved	11%	14%	15%	10%	15%	13%	21%	13%	10%	14%	13%	12%	12%	8%
Easier to book taxis with apps	13%	15%	18%	11%	14%	17%	22%	12%	13%	**15%**	16%	14%	12%	**19%**
Drivers less inclined to take longer routes	10%	8%	6%	5%	6%	9%	8%	8%	10%	10%	10%	9%	14%	9%
Driver behaviour and knowledge improved	8%	10%	6%	7%	8%	11%	10%	8%	13%	9%	14%	11%	16%	9%
Not available (or known) previously	-	-	-	-	-	-	-	-	2%	5%	3%	7%	5%	5%
COVID-related	-	-	-	-	-	-	-	-	-	-	-	**27%**	23%	17%
Because I get a fare estimate quoted in advance	-	-	-	-	-	-	-	-	-	-	-	-	-	14X%
Another reason	**33%**	24%	**26%**	**27%**	20%	19%	16%	17%	**29%**	**31%**	23%	21%	16%	23%

Other urban	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Mar 23
Sample size:	51	54	55	20	26	32	25	26	29
Less expensive	14%	7%	13%	20%	10%	**28%**	18%	17%	3%
More disposable income	14%	13%	16%	10%	2%	15%	9%	4%	9%
Going out more	**37%**	20%	**29%**	**30%**	**29%**	**37%**	24%	19%	**30%**
Don't have to wait as long	18%	17%	18%	10%	24%	25%	25%	13%	11%
Less access to alternatives	**39%**	**33%**	**31%**	20%	15%	18%	**27%**	8%	17%
Phone booking has improved	16%	11%	13%	15%	10%	16%	7%	15%	0%
Easier to book taxis with apps	10%	7%	4%	5%	11%	20%	7%	**27%**	9%
Drivers less inclined to take longer routes	12%	0%	7%	5%	6%	18%	11%	8%	14%
Driver behaviour and knowledge improved	16%	7%	13%	10%	6%	12%	13%	0%	0%
Not available (or known) previously	-	-	-	0%	0%	3%	6%	9%	4%
COVID-related	-	-	-	-	-	-	9%	21%	19%
Because I get a fare estimate quoted in advance	-	-	-	-	-	-	-	-	7%
Another reason	**25%**	**37%**	20%	**30%**	**38%**	9%	**29%**	**34%**	**32%**

Bold figures show the top 3 responses for each survey

Rest of NSW	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Mar 23
Sample size:	27	29	26	31	31	31	21	19	28
Less expensive	4%	7%	15%	6%	**16%**	**13%**	14%	4%	9%
More disposable income	4%	10%	15%	**10%**	8%	17%	20%	4%	10%
Going out more	**37%**	**41%**	**42%**	**39%**	**21%**	**25%**	**39%**	**52%**	5%
Don't have to wait as long	7%	21%	15%	0%	0%	16%	5%	8%	6%
Less access to alternatives	**26%**	**34%**	**27%**	**23%**	**11%**	**20%**	20%	24%	16%
Phone booking has improved	7%	7%	19%	0%	2%	6%	4%	4%	**28%**
Easier to book taxis with apps	11%	3%	12%	0%	10%	4%	4%	8%	8%
Drivers less inclined to take longer routes	7%	10%	15%	0%	0%	7%	4%	4%	14%
Driver behaviour and knowledge improved	11%	7%	19%	0%	7%	6%	5%	4%	8%
Not available (or known) previously	-	-	-	0%	0%	3%	3%	4%	6%
COVID-related	-	-	-	-	-	-	18%	6%	3%
Because I get a fare estimate quoted in advance	-	-	-	-	-	-	-	-	11%
Another reason	**41%**	24%	**42%**	**45%**	**40%**	**27%**	23%	23%	**46%**

Bold figures show the top 3 responses for each survey

Aside from the disruption of COVID-19 resulting in a much higher proportion of users attributing decreased use to going out less in 2020 and 2022, there have been no substantive or sustained changes in the **reasons users make less use of a particular point-to-point transport service** since the new survey was introduced in 2017 (see next page).

Typically going out less and having reduced need for point-to-point transport is one of the main reasons individual respondents reduce their use of all services, and this is again seen in 2023 (though to a lesser extent than in the more heavily COVID-affected surveys).

Cost (finding them more expensive than before) is usually less of a reason for rideshare users to say they have used them less. However, in 2023 users of all three services who feel they have used them less in the last 12 months commonly cited them being more expensive, especially in Sydney. The impact of rideshare surge pricing in Sydney was also a barrier for some users.

As seen in previous surveys, both before and during COVID-19, taxi users are much more likely to say they are now using rideshare than the reverse pattern.

Figure 11: Reasons for using transport services less in the last 12 months Q19

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution

Reasons why transport services have been used less in the last 12 months	Taxis			Rideshare services			Limousines or other hire vehicles		
Base = used service less in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*572*	*132*	*94*	*294*	*76*	*23*	*378*	*80*	*34*
I find them **more expensive** than before	**47%**	**34%**	**39%**	**39%**	25%	12%	21%	**25%**	**29%**
I have **less disposable income**	16%	21%	18%	24%	20%	22%	12%	18%	19%
Because **peak or surge pricing** makes them too expensive	15%	14%	12%	**29%**	14%	13%	5%	5%	2%
I'm **going out less** / have less need to get around	**27%**	**39%**	**31%**	**34%**	**41%**	**37%**	19%	19%	19%
Because I find I have to **wait longer** than I used to catch a one, or I **can't rely on one turning up** after I have booked it	15%	18%	12%	13%	17%	**28%**	2%	2%	4%
I have **better access to a car**	23%	**32%**	**40%**	**26%**	**30%**	16%	13%	**29%**	**27%**
Public transport has improved when I need it	23%	13%	4%	24%	6%	9%	12%	9%	3%
I **use taxis** instead				9%	6%	13%	7%	4%	23%
I **use limousine or other hire vehicle** services instead	2%	3%	2%	2%	3%	0%			
I **use rideshare** services instead	**34%**	**25%**	16%				16%	8%	18%
I **use car share, community transport** or **courtesy buses** instead	3%	1%	5%	1%	1%	0%	2%	0%	0%
Because **booking services have become worse**	6%	6%	9%	7%	4%	2%	4%	3%	6%
I have found that **driver behaviour and knowledge** has become worse in [AREA]	15%	5%	5%	7%	6%	0%	22%	8%	13%
I think drivers have become more inclined to **take longer routes or overcharge** me	18%	5%	8%	6%	9%	4%	2%	3%	4%
Because of things related to **COVID**	10%	11%	14%	11%	15%	4%	9%	11%	4%
For **another reason**	8%	8%	6%	6%	10%	5%	16%	15%	16%

Bold figures = 25%+ of respondent group. Pink cells = top 3 reasons in Sydney. Note small base sizes in some cases.

NOTES: Note low n values for Rest of NSW and Other Urban.
Data filtered only if used taxi in past 6 months pre-Nov 2017

Why have you used taxis to get around less?

Sydney	Nov 13	Feb 14	Nov 14	Feb 15	Nov 15	Feb 16	Nov 16	Feb 17	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Mar 23
Sample size:	335	292	333	302	351	323	296	305	632	697	637	876	744	572
More expensive	**59%**	**51%**	**50%**	**54%**	**53%**	**60%**	**53%**	**60%**	**46%**	**47%**	**50%**	**33%**	**31%**	**47%**
Less disposable income	**29%**	22%	22%	22%	21%	23%	17%	13%	12%	11%	10%	12%	9%	16%
Peak or surge pricing	-	-	-	-	-	-	-	-	11%	13%	17%	10%	10%	15%
Going out less	**36%**	**34%**	**32%**	**37%**	**35%**	**32%**	**28%**	**29%**	18%	19%	18%	**43%**	**38%**	**27%**
Have to wait longer	17%	13%	16%	16%	14%	18%	22%	**26%**	18%	**25%**	21%	14%	11%	15%
Better access to a car	**27%**	17%	**27%**	20%	22%	17%	16%	23%	22%	19%	17%	17%	17%	23%
Public transport improved	22%	23%	**25%**	**26%**	23%	24%	23%	21%	24%	23%	22%	19%	17%	23%
Use limousine/other hire vehicle	-	-	-	-	-	-	-	-	4%	6%	3%	2%	2%	2%
Use rideshare	-	-	-	-	16%	22%	**31%**	**39%**	**37%**	**41%**	**44%**	**33%**	**30%**	**34%**
Use car share, community transport or courtesy buses	-	-	-	-	13%	16%	6%	5%	5%	3%	3%	3%	3%	3%
Booking services have become worse	6%	6%	6%	5%	4%	5%	7%	7%	7%	8%	7%	4%	5%	6%
Drivers more inclined to take longer routes	21%	17%	16%	16%	18%	16%	16%	19%	23%	24%	19%	10%	10%	15%
Driver behaviour/ knowledge worse	**26%**	13%	16%	13%	14%	14%	16%	19%	18%	21%	16%	12%	12%	18%
COVID-related reasons	-	-	-	-	-	-	-	-	-	-	-	**42%**	**43%**	10%
Another reason	7%	14%	11%	9%	7%	6%	8%	4%	10%	9%	11%	7%	5%	8%

Other urban	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Mar 23
Sample size:	46	62	54	96	130	144	139	144	132
More expensive	**39%**	**48%**	**43%**	**41%**	**41%**	**46%**	**29%**	**26%**	**34%**
Less disposable income	**35%**	**27%**	**26%**	16%	16%	17%	10%	12%	21%
Peak or surge pricing	-	-	-	20%	11%	13%	10%	6%	14%
Going out less	**43%**	**34%**	**43%**	**25%**	23%	**26%**	**42%**	**42%**	**39%**
Have to wait longer	11%	16%	19%	13%	22%	17%	14%	8%	18%
Better access to a car	20%	**34%**	**39%**	**31%**	**31%**	**27%**	**34%**	**28%**	**32%**
Public transport improved	11%	10%	15%	13%	16%	14%	6%	6%	13%
Use limousine/other hire vehicle	-	-	-	7%	3%	3%	2%	1%	3%
Use rideshare	-	5%	19%	17%	23%	**32%**	21%	21%	**25%**
Use car share, community transport, courtesy buses	-	10%	4%	5%	4%	4%	1%	2%	1%
Booking services have become worse	2%	6%	7%	10%	9%	6%	4%	6%	6%
Drivers more inclined to take longer routes	9%	8%	13%	14%	13%	5%	10%	5%	5%
Driver behaviour/ knowledge worse	7%	5%	9%	13%	16%	8%	12%	4%	5%
COVID-related reasons	-	-	-	-	-	-	**39%**	**47%**	11%
Another reason	7%	3%	6%	14%	7%	9%	10%	5%	8%

Rest of NSW	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18	Nov 19	Nov 20	Mar 22	Mar 23
Sample size:	29	22	17	72	82	101	95	93	94
More expensive	**34%**	**41%**	**47%**	**43%**	**41%**	**39%**	**30%**	20%	**39%**
Less disposable income	24%	**32%**	18%	17%	14%	14%	13%	13%	18%
Peak or surge pricing	-	-	-	14%	8%	13%	5%	7%	12%
Going out less	**45%**	**36%**	**59%**	**38%**	**28%**	**34%**	**40%**	**47%**	**31%**
Have to wait longer	3%	5%	6%	13%	12%	5%	5%	5%	12%
Better access to a car	**48%**	**27%**	**35%**	**26%**	**45%**	**36%**	**28%**	**30%**	**40%**
Public transport improved	3%	5%	6%	6%	5%	6%	2%	4%	4%
Use limousine/other hire vehicle	-	-	-	3%	2%	0%	1%	0%	2%
Use rideshare	-	0%	0%	14%	9%	12%	12%	6%	16%
Use car share, community transport or courtesy buses	-	14%	6%	1%	4%	1%	3%	1%	5%
Booking services have become worse	3%	0%	0%	7%	7%	3%	3%	5%	9%
Drivers more inclined to take longer routes	7%	0%	6%	6%	5%	3%	4%	2%	5%
Driver behaviour/ knowledge worse	3%	0%	18%	7%	9%	5%	8%	2%	8%
COVID-related reasons	-	-	-	-	-	-	**28%**	**36%**	14%
Another reason	3%	9%	18%	13%	9%	11%	13%	10%	6%

Bold figures show the top 3 responses for each survey

Impact of using hire vehicles in the last 6 months

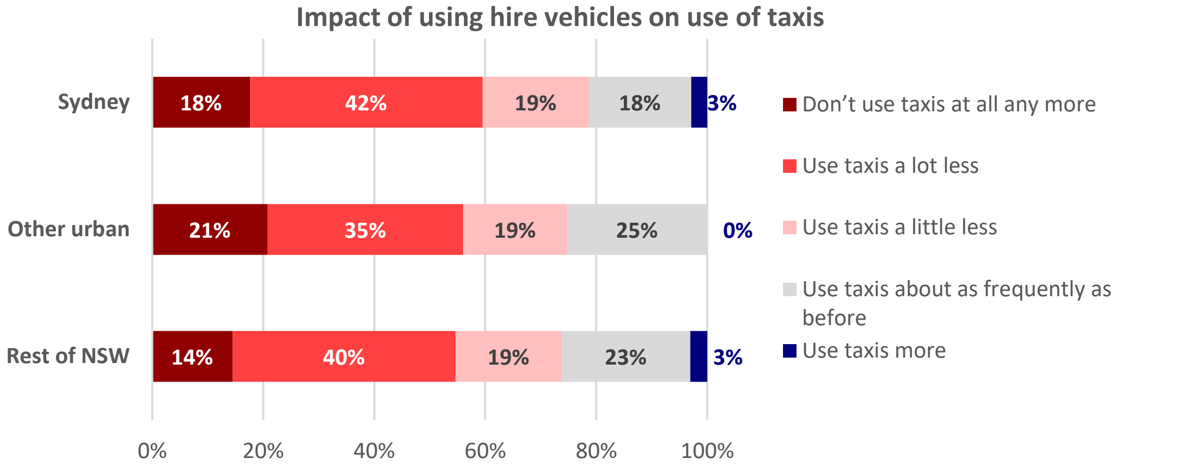
Given the ongoing trend of a nett decline in the use of taxis and a nett increase in the use of rideshare, it is not surprising that the reported impact of hire vehicles[1] has been a reduction in use of taxis.

The following chart is based on respondents who have *ever* used taxis *and* who have also used rideshare in their location in the last 6 months.

It shows that across the three locations, "*as a result of* using hire vehicles" 14%-21% of respondents now no longer use taxis at all, and more than three-quarters report at least some level of decline in their taxi usage. While the exact magnitudes vary somewhat, the general pattern of the results observed is quite consistent across locations, and has been quite consistent over years (even back to before the impact of COVID-19).

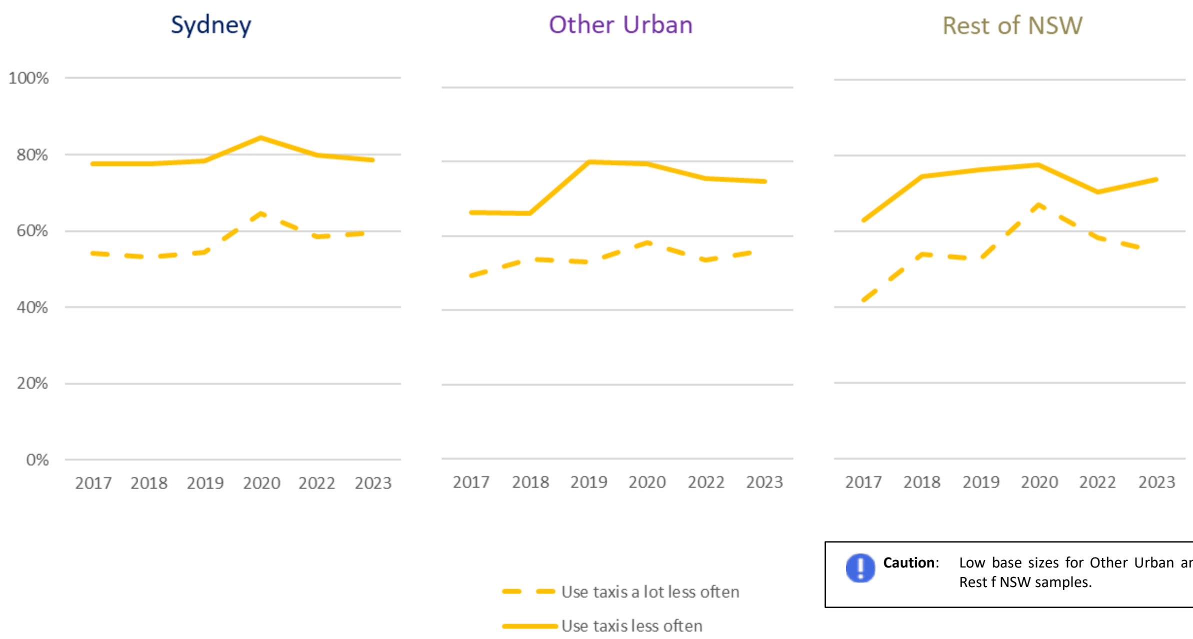
[1] Could be *rideshare* and / or *limousines and other hire vehicles* in this question

Figure 12: Reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17



Base = Used hire vehicles in the last 6 months and ever used taxis [Sydney n=1032; Other Urban n=174; Rest of NSW n=64]

Figure 13: Changes in reported impact of using hire vehicles on the use of taxis amongst users of both services (proportion of taxi users whose use has declined or stopped) Q17



Caution: Low base sizes for Other Urban and Rest f NSW samples.

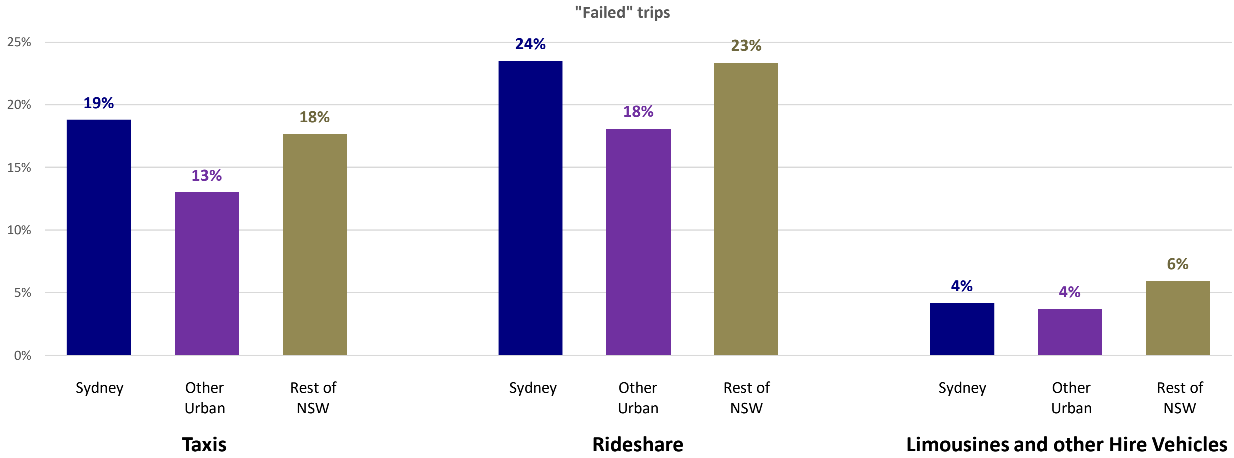
Problems

Failed Trips

<u>Of those aware of the services operating in their area,</u> small but noticeable minorities of respondents in each location typically report 'failed' trips within the 6 months prior to the survey – that is, where they had tried to use forms of transport and not been able to. Unsurprisingly given their relative usage, this is generally much less common for limousines and other hire vehicles than it is for taxis and rideshare, where the proportions have been approximately comparable. In 2023 slightly higher proportions of those aware of rideshare reported a failed trip compared to taxis.

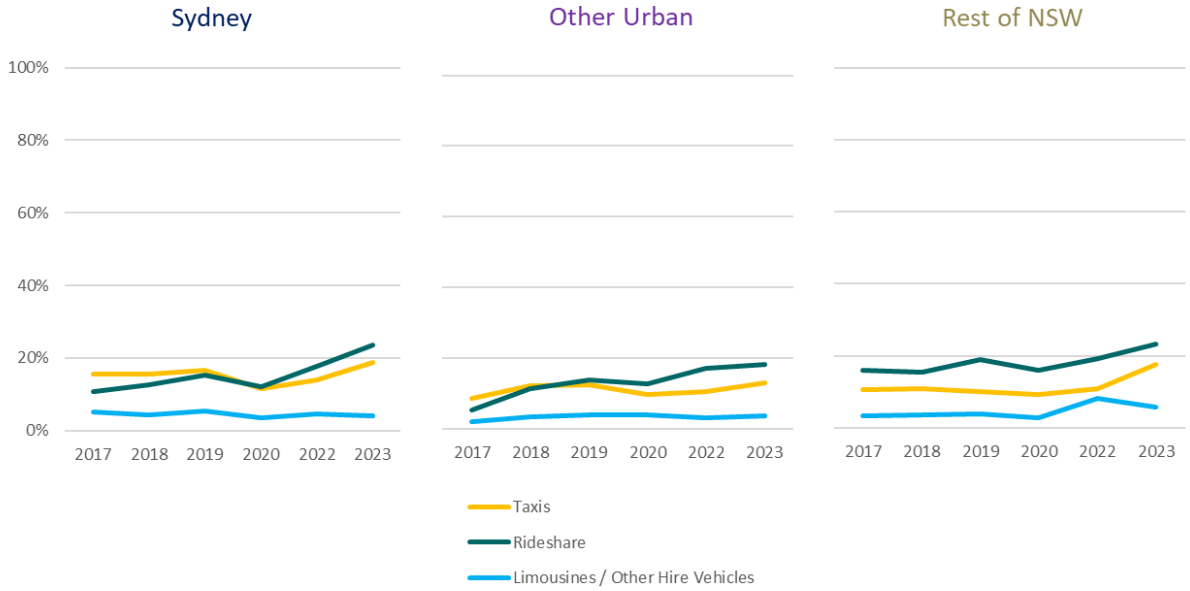
The tracking charts show that the incidence of failed trips has been trending up for rideshare for some time, while remaining more stable for taxis. Reports of failed trips for both services were somewhat higher in 2023 compared to 2022.

Figure 14: Prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14



Base = Aware of services [Sydney n=1,588-1989; Other Urban n=373-489; Rest of NSW n=206-384]

Figure 15: Change in prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14



All respondents

Figure 16: Prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location AND all respondents)* Q14

Use in the last 6 months		Taxis			Rideshare services			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
% of those aware of service in location	2023	19%	13%	18%	24%	18%	23%	4%	4%	6%
	Sample size	1,989	498	384	1,927	439	214	1,588	373	206
	2022	14%	11%	11%	18%	17%	19%	5%	3%	8%
	Sample size	2,003	509	371	1,935	420	194	1,624	388	191
	2021	12%	10%	9%	12%	13%	16%	4%	4%	3%
	Sample size	1,962	480	378	1,909	400	191	1,589	373	203
	2020	17%	13%	10%	15%	14%	19%	6%	4%	4%
	Sample size	2,040	498	416	1,968	420	191	1,626	399	233
	2019	16%	12%	11%	13%	11%	15%	4%	3%	4%
	Sample size	2,103	523	439	2,015	406	193	1,781	432	247
	2018	15%	9%	11%	11%	5%	16%	5%	2%	3%
	Sample size	2,009	487	415	1,825	297	131	1,686	374	202
% of all respondents	2023	18%	12%	16%	22%	15%	13%	3%	3%	3%
	Sample size	2,030	530	416	2,030	530	416	2,030	530	416
	2022	14%	10%	10%	17%	14%	10%	3%	2%	4%
	Sample size	2,070	541	412	2,070	541	412	2,070	541	412
	2020	11%	9%	8%	11%	10%	8%	3%	3%	1%
	Sample size	2,026	508	407	2,026	508	407	2,026	508	407
	2019	16%	12%	9%	14%	11%	8%	4%	3%	2%
	Sample size	2,095	522	446	2,095	522	446	2,095	522	446
	2018	15%	12%	10%	12%	9%	7%	4%	3%	2%
	Sample size	2,147	533	478	2,147	533	478	2,147	533	478
	2017	15%	8%	10%	9%	3%	5%	4%	2%	2%
	Sample size	2,048	501	453	2,048	501	453	2,048	501	453

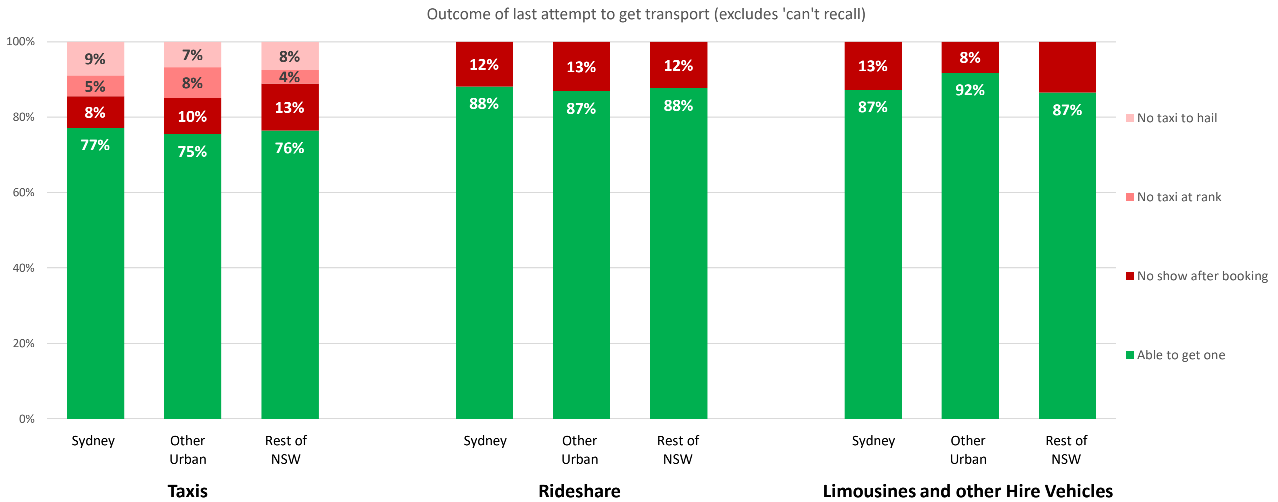
Outcome of last attempt

Despite the further increase in the proportion of rideshare users who report any failed trip in the last six months, the proportion of users who successfully got a rideshare on their very last attempt remains higher than for taxis (see next page). In 2022 75-77% of users reported successfully getting a taxi on their last attempt, while 87-88% of rideshare users did.

In part, this pattern is because failed attempts to get taxis also include rank and hail attempts, which do not apply to rideshare (or limousines or other hire vehicles).

Rank and hail difficulties are peculiar to taxis, but failure to show after booking is a failure common to all services. Rideshare had a post-booking failure rate of 12-13%, still somewhat higher than the 7%-8% seen in 2019 and 2020. When isolated in this way, taxis had a no-show failure rate of 9%-14% across locations (similar to 2020 and 2022, and also still slightly higher than the 8%-10% fail rate in 2019).

Figure 17: Outcome of last attempt to obtain transport among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30

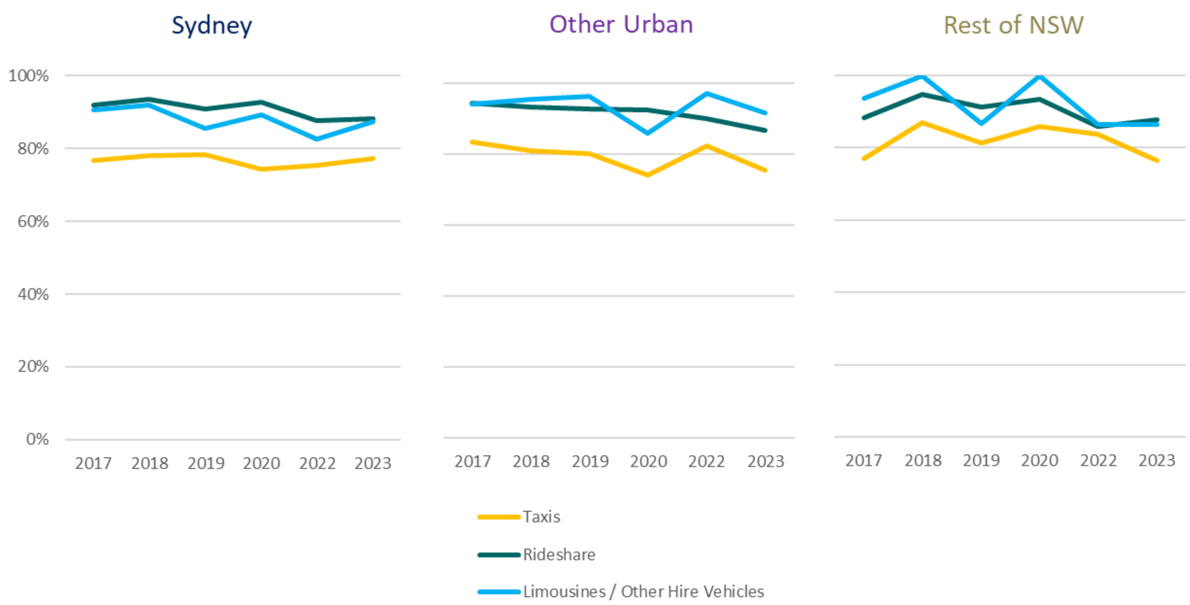


Base = Used services in the last 12 months, excludes 'can't recall outcome' responses
[Sydney n=253-1053; Other Urban n=51-215; Rest of NSW n=23-167]

The tracking chart below shows that the overall success rates for rideshare have been trending lower, and have been at their lowest in the last two surveys. In Sydney the success rate for taxis has been steady since the new survey was introduced in 2017, but the overall success rate has fallen a little in other urban areas and the rest of NSW in the last few surveys.

Success rates for getting limousines and other hire vehicles fluctuates more, primarily due to the smaller sample sizes, but on average remain on par with rideshare.

Figure 18: Change in success rate for last attempt among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30



Actions when unable to get transport

Only sometimes when a respondent was last unable to get their preferred form of transport did they end up not making the trip at all – with this generally happening between 10%-20% of the time. Typically a somewhat higher proportion of those who are unable to get a taxi report not making the trip at all compared to those unable to get a rideshare, and this pattern is again seen in 2023.

Taxis and rideshare pick up a substantial proportion of the cases where the other was not able to be used, with public transport and self-travel covering most other cases. Alternative solutions remain fairly similar across taxis and rideshare. For those unable to get a limousine or other hire vehicle in Sydney in 2022, taxis and rideshare were equally likely to be used instead, and with around half using public transport instead.

Outside of Sydney a broadly similar pattern is seen, but predictably with less alternative use of public transport options and a higher incidence of private vehicles.

Figure 19: Actions taken when unable to get point-to-point transport (multiple response) Q15/31

NOTE: * Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution

Actions taken when last unable to get point-to-point transport Multiple responses allowed, so columns add to more than 100%	When last unable to get a **taxi**			When last unable to get a **rideshare**			When last unable to get a **limousines or other hire vehicle**		
***Base:** Combined responses from any failed attempt in last 12 months (Q14/15) OR if last attempt was unsuccessful (q30/31)*	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*342*	*67*	*63*	*400*	*78*	*41*	*61*	*16*	*12*
Took a train	**36%**	**31%**	8%	**34%**	10%	17%	**34%**	**27%**	23%
Used a rideshare service instead	**40%**	**35%**	14%	-	-	-	12%	21%	0%
Took a regular bus (ie, not a courtesy bus)	24%	17%	11%	**26%**	18%	13%	25%	**26%**	**26%**
Drove myself or got a lift	20%	**42%**	**51%**	**28%**	**44%**	**39%**	19%	12%	14%
Walked or cycled	22%	**27%**	**34%**	18%	18%	**28%**	6%	8%	7%
Decided not to make the journey at all	19%	17%	8%	11%	9%	12%	15%	13%	**40%**
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	12%	11%	3%	8%	6%	9%	15%	12%	0%
Used a limousine or other hire vehicle service	6%	6%	2%	5%	3%	0%	-	-	-
Used courtesy transport provided by a venue such as a pub or club	7%	6%	10%	6%	11%	7%	14%	8%	10%
Used a bikeshare service	5%	2%	4%	4%	2%	6%	4%	17%	0%
Used a car sharing service such as GoGet or Car Next Door	12%	9%	5%	7%	5%	0%	18%	4%	0%
Used a taxi instead	-	-	-	**35%**	**34%**	**38%**	17%	0%	17%
Something else	9%	6%	10%	7%	3%	6%	7%	10%	10%
Can't recall	2%	2%	4%	5%	3%	4%	6%	6%	8%

Bold figures = 20%+ of respondent group. Note small base sizes in some cases.

ORIMA

The longer-term trends observed in the following tables show rideshare as an alternative when taxis are not available significantly starting around 2016 and 2017. Over the past few surveys this proportion has not continued to grow in Sydney or in the rest of NSW, but does continue to increase in other urban areas.

In Sydney, use of public transport when taxis are not available was lower in 2018 – but in 2020 and 2022, public transport options were commonly reported amongst people when not able to use taxis. This pattern is less apparent in 2023.

The proportion not making the journey at all when taxis are not available was somewhat higher in the two COVID-era survey waves, and then has remained somewhat above the longer-term average in the 2023 survey.

NOTES: * November 2016 asked the question as a single response and is not directly comparable with other years. Note low n values for Other Urban and Rest of NSW in previous years.

On the last occasion you were unable to use a taxi, what did you do instead?

Sydney	Nov-13	Feb-14	Nov-14	Feb-15	Nov-15	Feb-16	Nov-16	Feb-17	Nov-17	Nov-18	Nov-19	Nov-20	Mar-22	Mar-23
Sample size	*209*	*120*	*254*	*199*	*279*	*266*	*248**	*224*	*311*	*469*	*453*	*227*	*257*	*342*
Took a train	**31%**	**34%**	**36%**	**29%**	**33%**	**35%**	29%	**29%**	**35%**	**22%**	**33%**	**42%**	**42%**	**36%**
Used a rideshare service instead			2%	2%	3%	8%	12%	21%	**32%**	**31%**	**29%**	**38%**	**33%**	**40%**
Took a regular bus	**32%**	**26%**	**28%**	**40%**	**30%**	**27%**	17%	**25%**	**25%**	**21%**	**21%**	**28%**	**26%**	**24%**
Drove myself or got a lift	**23%**	**22%**	**22%**	**19%**	**20%**	16%	15%	**21%**	24%	19%	17%	21%	21%	20%
Walked or cycled	17%	18%	15%	14%	18%	14%	9%	9%	18%	14%	14%	18%	16%	22%
Decided not to make the journey at all	12%	17%	12%	9%	13%	**18%**	8%	8%	12%	10%	14%	17%	22%	19%
Used community transport	6%	2%	8%	8%	10%	7%	6%	8%	12%	9%	9%	14%	15%	12%
Used a limo or other hire vehicle service	2%	3%	3%	3%	7%	7%	2%	7%	10%	7%	7%	13%	8%	6%
Used courtesy transport					2%	2%	0%	2%	8%	5%	8%	8%	9%	7%
Used a bike sharing service										6%	6%	6%	8%	5%
Used a car sharing service			2%	1%	3%	3%	1%	3%	9%	4%	5%	6%	9%	12%
Something else									8%	8%	8%	9%	6%	9%
Can't recall									8%	4%	5%	5%	3%	2%

Bold figures show the top 3 responses in each survey

Other Urban	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-20	Mar-22	Mar-23
Sample size	*39*	*47*	*23**	*42*	*85*	*87*	*36*	*48*	*48*
Took a train	13%	11%	9%	24%	**17%**	16%	20%	20%	31%
Used a rideshare service instead	0%	4%	4%	17%	**17%**	**25%**	**32%**	**36%**	**35%**
Took a regular bus	**28%**	**23%**	**35%**	**14%**	**18%**	**18%**	**16%**	**8%**	**17%**
Drove myself or got a lift	**28%**	**36%**	**22%**	**29%**	**30%**	**22%**	**31%**	**43%**	**42%**
Walked or cycled	21%	13%	**13%**	**31%**	15%	13%	29%	26%	27%
Decided not to make the journey at all	**23%**	**17%**	9%	14%	9%	12%	23%	17%	17%
Used community transport	8%	11%	4%	7%	3%	7%	6%	4%	11%
Used a limo or other hire vehicle service	3%	4%	4%	10%	9%	2%	5%	4%	6%
Used courtesy transport		4%	0%	5%	5%	7%	7%	5%	6%
Used a bike sharing service					0%	3%	0%	4%	2%
Used a car sharing service	0%	0%	0%	7%	0%	2%	0%	6%	9%
Something else				2%	4%	9%	1%	8%	6%
Can't recall				14%	2%	5%	5%	3%	2%

Rest of NSW	Nov-14	Nov-15	Nov-16	Nov-17	Nov-18	Nov-19	Nov-20	Mar-22	Mar-23
Sample size	*9*	*13*	*6**	*44*	*61*	*64*	*29*	*35*	*35*
Took a train	0%	0%	0%	14%	9%	**15%**	14%	31%	8%
Used a rideshare service instead	0%	0%	0%	14%	**15%**	10%	**14%**	**24%**	**14%**
Took a regular bus	33%	8%	17%	9%	12%	13%	**10%**	**24%**	**11%**
Drove myself or got a lift	33%	8%	33%	**27%**	**15%**	**18%**	**32%**	**48%**	**51%**
Walked or cycled	22%	62%	33%	**32%**	**31%**	**16%**	27%	18%	34%
Decided not to make the journey at all	11%	15%	17%	20%	10%	**15%**	5%	22%	8%
Used community transport	0%	0%	0%	7%	3%	7%	10%	10%	3%
Used a limo or other hire vehicle service	0%	0%	0%	5%	1%	3%	4%	0%	2%
Used courtesy transport		8%	0%	2%	4%	7%	2%	21%	10%
Used a bike sharing service					0%	5%	7%	0%	4%
Used a car sharing service	0%	0%	0%	5%	0%	4%	7%	0%	5%
Something else				**9%**	7%	5%	9%	5%	10%
Can't recall				14%	9%	5%	8%	6%	4%

Bold figures show the top 3 responses in each survey

Problems Experienced

There are a range of problems that people can experience using point-to-point transport services, ranging from obtaining a vehicle, to driver skill and service, to cost. Difficulty in getting point-to-point transport at major events is the most common problem universal to taxis and rideshare.

Over the life of the surveys, people in Sydney and users of taxis have typically reported higher levels of problems overall – though this pattern has been somewhat less evident in relation to Sydney in the past two surveys. Sydney respondents did report higher levels of problems with taxis, but not with rideshare or with limousines or other hire vehicles – the same as was seen in 2022.

Slightly more users reported a problem with taxis than with rideshare in Sydney, but the figures were very similar in other urban areas and the rest of NSW. Rates of problems are considerably lower for limousines and other hire vehicles.

Figure 20: Problems experienced using point-to-point transport amongst users Q28

NOTE: Small bases sizes for Rest of NSW.

Problems experienced using point-to-point transport *Multiple responses allowed, so columns add to more than 100%*	Using **taxis**			Using **rideshare services**			Using **limousines** or **other hire vehicles**		
Base = used service more in past 12 months	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*1140*	*228*	*175*	*1198*	*210*	*89*	*301*	*62*	*26*
Had **no problems**	**32%**	**44%**	**44%**	**39%**	**43%**	**41%**	**64%**	**79%**	**77%**
Driver did not take the most **direct** route	**23%**	13%	13%	**15%**	14%	11%	9%	7%	8%
Driver did not know **where they were going**	**17%**	9%	9%	12%	10%	12%	3%	2%	2%
Difficulty getting one at a **major event**	**23%**	**23%**	**27%**	**23%**	**18%**	**27%**	9%	8%	7%
I was **overcharged**	**25%**	13%	**15%**	12%	9%	5%	10%	4%	0%
Peak or surge **price**	**17%**	**18%**	**18%**	**30%**	**24%**	**22%**	5%	6%	5%
COVID-19 cleanliness or hygiene	**16%**	8%	10%	8%	7%	10%	3%	2%	0%
Difficulty getting one at some **other time**	**18%**	**20%**	**21%**	**18%**	**24%**	**19%**	6%	5%	0%
Driver was **rude, unhelpful** or **offensive**	13%	9%	9%	6%	6%	6%	2%	2%	0%
Unsafe (driving manner, breaking road rules)	9%	5%	2%	6%	6%	6%	2%	1%	0%
Driver **refused destination**	11%	4%	3%	3%	2%	2%	2%	0%	0%
Something else	3%	2%	4%	2%	0%	1%	3%	2%	0%

Bold figures = 15%+ of respondent group. Pink cells are the three most common.
Most “something else” responses were back-coded into existing categories. Note small base sizes in some cases.

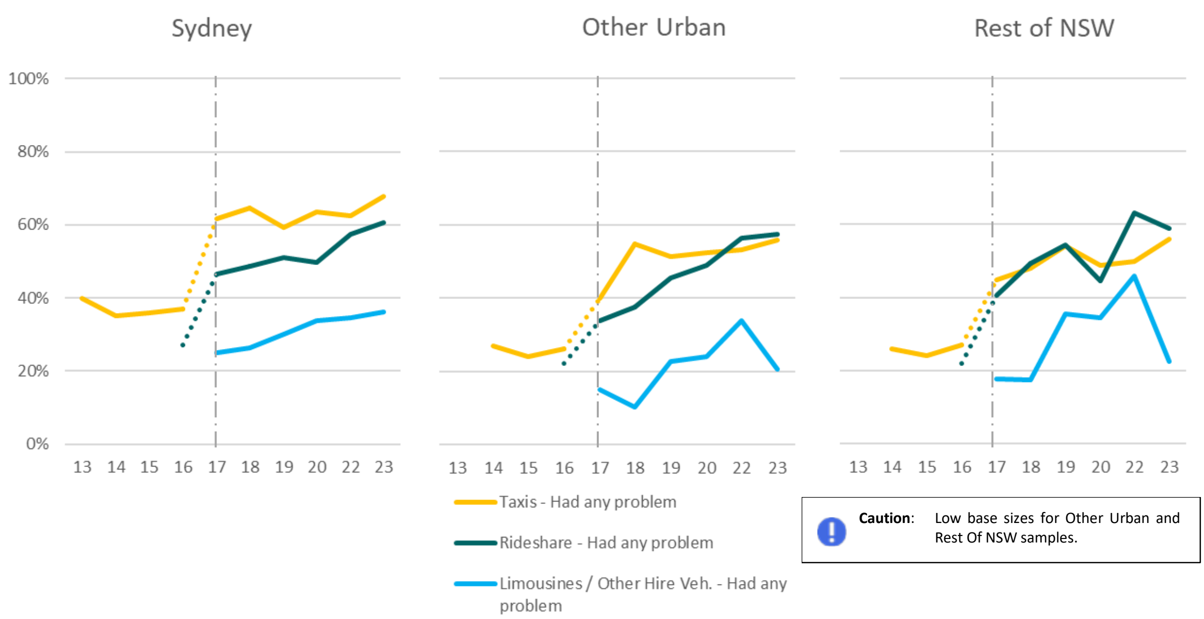
68% of taxi users in Sydney reported at least one problem, at the higher end of the 60%-65% range seen in all previous surveys going back to 2017. 56% of taxi users in other urban areas reported a problem, compared to 50%-53% through 2019-22. 56% also reported a problem in the rest of NSW, compared to 49%-54% in the three previous surveys. The most common problems in Sydney were route knowledge and over-charging, while obtaining a taxi and surge pricing were more common problems outside of Sydney.

While the proportion of users reporting at least one problem with taxis is slightly higher in 2023, the proportion of rideshare users who report problems has been trending upwards much more strongly in all locations since 2017. In Sydney this has increased from under 50% in 2017 to 61% in 2023, and from less than 40% outside of Sydney to 57% in other urban areas and 59% in the rest of NSW in 2023. The most common problems reported across all areas are surge pricing and difficulty in obtaining a car.

Note: The methodology for this question was changed from the 2017 survey onwards. Previously the question asked whether the user had experienced any problems, and only then for details if they said yes. From 2017, the question presents the list of potential problems, and the proportion recorded here are those who say they had *any of these experiences*. This revised approach is more likely to result in higher reporting, as it both prompts respondents for experiences they may not spontaneously recall, and also makes clear what is meant by *'a problem'*. For this reason, the pre-2017 and post-2017 data in the tracking charts is connected with a dotted line.

In Sydney and other urban areas, from 2017-2019 taxi users tended to report a higher level of experiencing any problem than did rideshare users. However, with the rate of problems experienced by rideshare users increasing faster, this gap has closed in Sydney and users of the two services are now approximately equally likely to experience problems in other urban areas. Fewer users report problems with limousines or other hire vehicles.

Figure 21: Change in experiencing ANY problem using point-to-point transport amongst users Q28



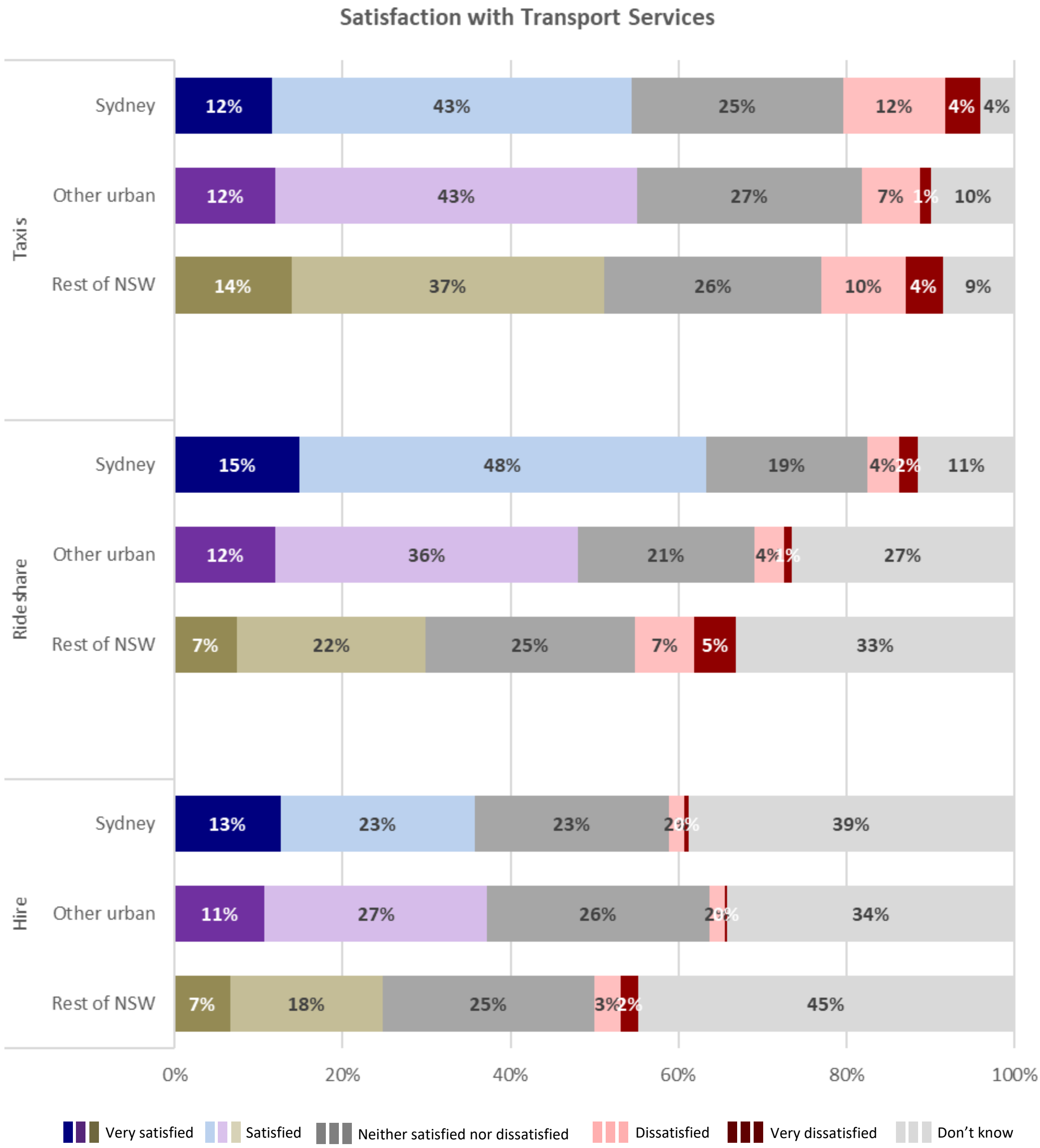
Satisfaction with Services

Satisfaction with available taxi services amongst all respondents (not just users) remains moderately strong at 51-55% across all locations. This remains somewhat lower than the peak of 58-61% seen in 2019, but within +2 percentage points (pp) of the 2022 figures.

Satisfaction with rideshare services is higher than taxis in Sydney (63% v 55%), but lower in other urban (48% v 55%) and in the rest of NSW (30% v 49%). These figures were within +4pp of 2022.

Absolute satisfaction with limousines and other hire vehicle services remains considerably lower, and also within +3pp of 2022.

Figure 22: Satisfaction with point-to-point transport services Q7/10



	Taxis			Rideshare			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2030*	*530*	*416*	*2030*	*530*	*416*	*2030*	*530*	*416*
Satisfied	54%	55%	51%	63%	48%	30%	36%	37%	25%
Dissatisfied	16%	8%	14%	6%	4%	12%	2%	2%	5%
Differential	+38%	+47%	+37%	+57%	+44%	+18%	+33%	+35%	+20%
Differential compared to 2022	*-5%*	*+3%*	*-%*	*+%*	*+4%*	*+%*	*-4%*	*-%*	*+3%*

Base = All respondents [Sydney n=2,030; Other Urban n=530; Rest of NSW n=416]

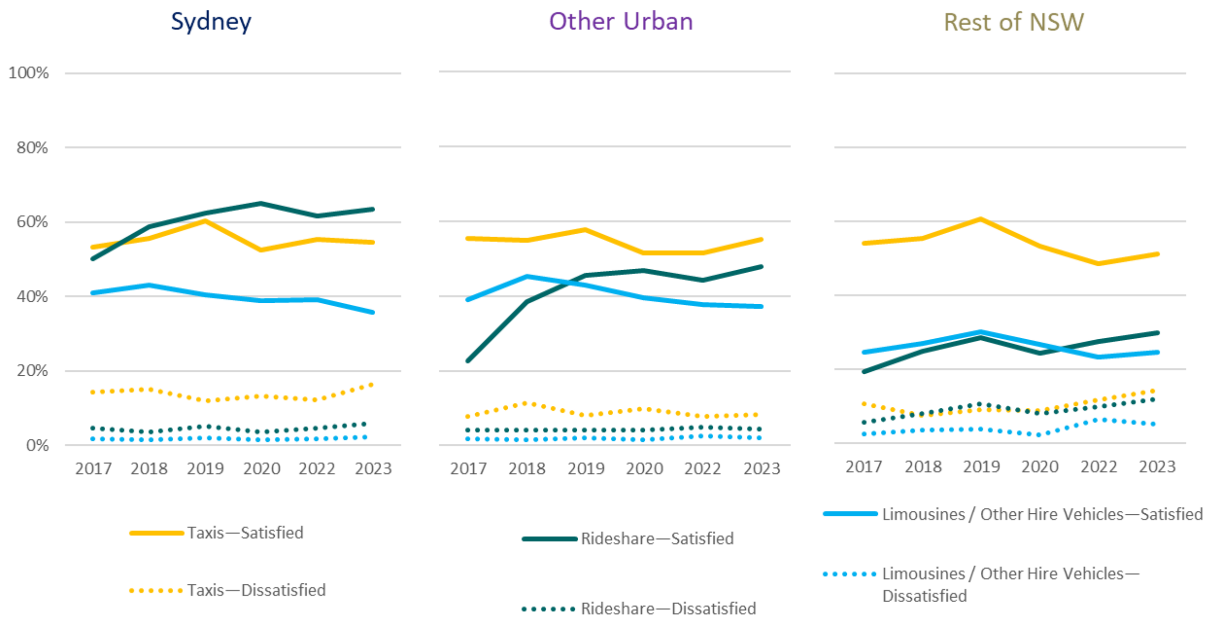
* Differential = % (Very satisfied + Satisfied) minus % (Very dissatisfied + Dissatisfied). The higher the differential, the better the perceived value. *Note: differentials are based on results to one decimal place, and may look different to the rounded whole numbers shown in the table.*

The relative emergence of rideshare compared to the maturity of taxis can be readily seen in the track of satisfaction since 2017. In all locations satisfaction with taxis has tracked in a flat band, albeit peaking in 2019 and declining a little in the COID-affected surveys.

By comparison, satisfaction with the available rideshare service has grown in all locations. This has been most pronounced in other urban areas (as awareness and availability has grown on a trajectory lagging somewhat behind the service in Sydney), and least pronounced in the rest of NSW (where the service remains much less prevalent). As a result of this growth, satisfaction with rideshare services is now somewhat higher than taxis in Sydney, and only somewhat lower in other urban areas. In both areas the satisfaction ratings have more or less paralleled each other at these levels since 2020.

Satisfaction with limousines and other higher vehicles is lower, though on par with rideshare in the rest of NSW. Active dissatisfaction is lowest for limousines and other hire vehicles, and highest for taxis in Sydney and other urban areas.

Figure 23: Change in satisfaction with point-to-point transport services Q7/10



B. Perceptions of Point-to-Point Transport Options

Strengths and Weaknesses

Customer perceptions of 11 dimensions are considered in the survey, which can be classified into two broad categories – ‘practical’ and ‘quality’. The average of each individual element is taken as the ‘index score’ for the dimension.

Practical dimensions	Quality dimensions
Convenience	Vehicle quality
Safety	Navigation and route knowledge
Availability	Driving skills
Waiting times	Driver presentation and attitude
Value for money	Customer service
Hygiene during COVID New in 2020	

Respondents are asked to rate each dimension as a ‘strength’, a ‘weakness’ or a ‘neutral’ characteristic of each type of transport. Over the following pages, charts show perceptions for each type of transport for each of the three locations. The figures reported are the ‘differential’ between the proportion of people who identified each dimension as a *strength* minus the proportion who identified it as a *weakness*. See appendix C for detailed charts showing strengths and weaknesses ratings.

Both the macro patterns and the general tone of community perceptions have been consistent across surveys – suggesting that even though there have been substantial changes in the marketplace dynamics, perceptions of the fundamental characteristics and strengths of the various individual transport services have not changed greatly. There are also broad consistencies in the way that taxis, rideshare and limousines / other hire vehicles have been perceived across the three survey locations, though there are some nuances in all of these patterns.

The key consistencies seen are:

- Rideshare tends to be the leader in the practical dimensions. The major positive point of difference for rideshare is felt to be *value for money*, while *convenience*, *waiting times* and *availability* are also key competitive strengths (especially in Sydney). The least positive facets of rideshare are largely driver-related, being *safety*, *driving skills* and *navigation*.
- Limousines and other hire vehicles are seen as the leader in quality dimensions, with relative strengths in terms of all ‘quality’ dimensions plus *safety*. They have a relative weakness in terms of *value*, and are lower in *availability*, *convenience* and *waiting times* – which are notably the same dimensions that are seen as relative strengths of rideshare.
- Taxis do not tend to have any clear points of differentiation as strengths, and they score particularly low for perceived *value for money*. They are also the most likely to have *all* dimensions rated as a weakness. See Appendix C for the detailed breakdown of strengths and weaknesses

Variations across the locations are described on the following pages.

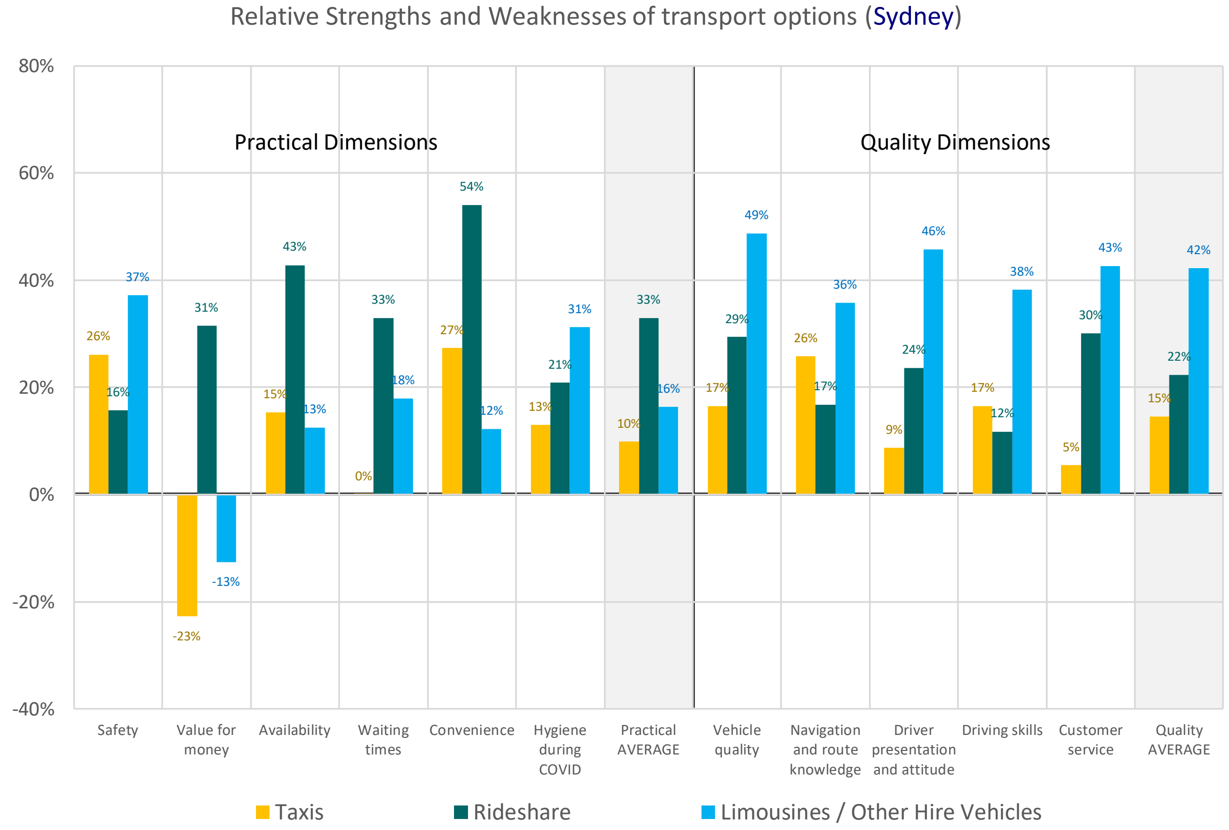
Perceptions of the three different types of services have been generally consistent across the years these items have been included in the survey. These following charts show the **nett differential rating**, being the difference between the proportions who say each dimension is a strength minus those who say it is a weakness. A positive differential indicates more people think of the dimension as a strength, and a negative differential indicates more people think of a dimension as a weakness.

In Sydney, taxis typically have the lowest nett differential scores for a number of quality and practical dimensions, and they again have the lowest overall average for both categories in 2023. The overall patterns and ratings are almost identical to those seen in the 2022 survey. Taxis outrated rideshare on three dimensions, but were rated lower on the other eight. Perceived *value for money* remains at the same slightly less negative level as seen in 2022.

Rideshare retains its very strong positive differentiation on *value*, but this continues to decline somewhat (current the nett score is +31% compared to +48% in 2019). It leads taxis on all practical dimensions except for *safety*, and still scores a little higher on the new *hygiene during COVID* dimension. Rideshare doesn't match limousines and other hire vehicles on the quality dimensions, but is ahead of taxis for *vehicle quality, driver presentation and attitude* and especially *customer service*. Overall results are in line with 2022.

Broadly, rideshare scores highest across practical dimensions (with the exception of an apparent and persistent concern about *safety*), and remains particularly positively differentiated in terms of *value*. Limousines and other hire vehicles have a clear and strong position on the 'quality' dimensions. These macro patterns are all as per what has been seen in previous waves of the survey.

Figure 24: Strengths and weaknesses of transport options amongst those aware of the service in their region - Sydney Q64



Base = Respondents aware of service in location [Taxis n=1,989; Rideshare n=1,927; Limo / Other n=1,588]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

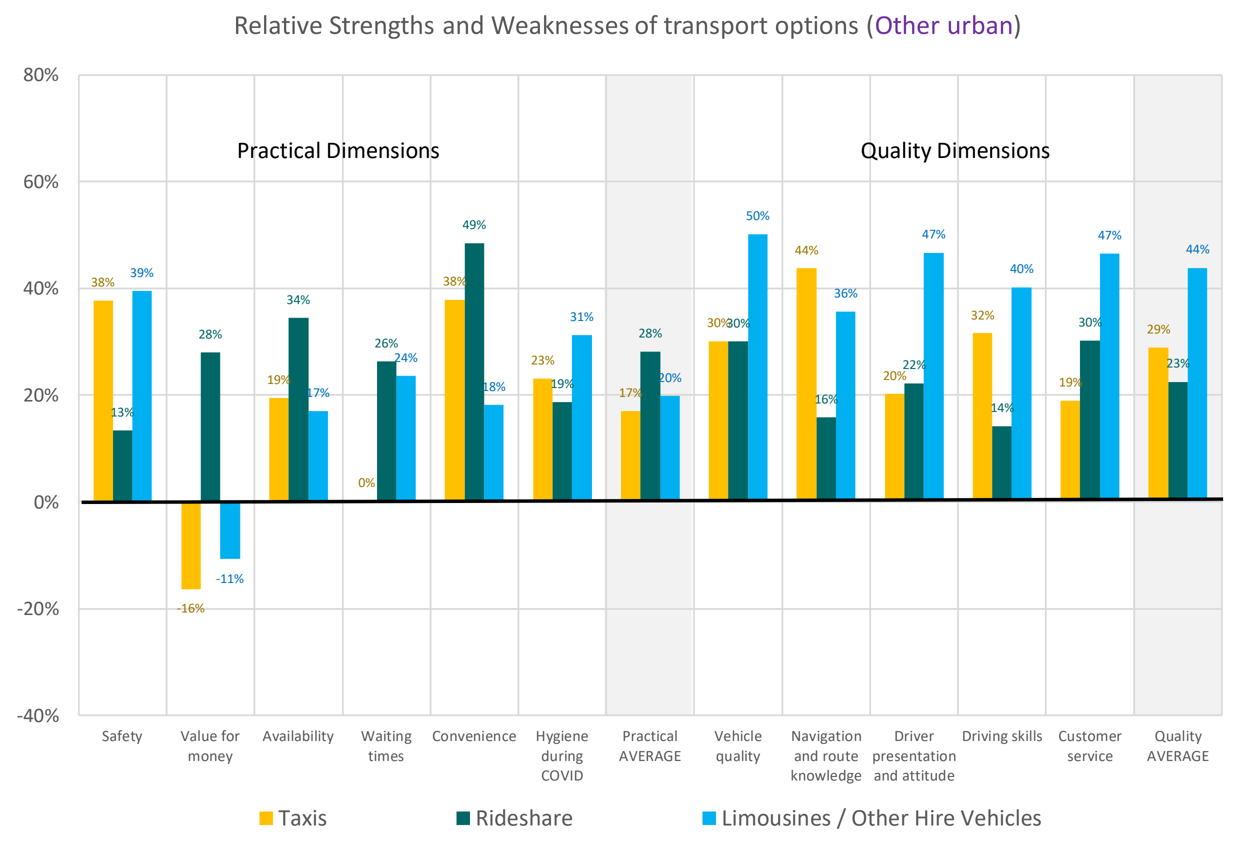
While there are some minor variations seen in other urban areas compared to Sydney, overall the macro patterns are very similar. Rideshare owns perceptions of *value,* and limousines and other hire vehicles own ‘quality’. This biggest difference is that while in both locations the practical average is considerably higher for rideshare than taxis, in other urban areas the quality average remains slightly higher for taxis than rideshare – reversing the pattern in Sydney.

Compared to Sydney, in other urban areas taxis are rated more positively on a number of dimensions – though not to the same extent as seen previously. The taxi averages for both the practical and quality dimensions are higher in other urban areas compared to Sydney. The practical average for taxis in other urban areas is 17% (-3% on 2022) compared to 10% (-2%) in Sydney, and the quality average is 29% (-2%) compared to 15% (-2%).

By comparison, averages in both dimensions for rideshare are virtually identical in Sydney and in other urban areas. The rideshare practical average is 28% in other urban areas (-3% compared to 2022) and 33% (-2%) in Sydney, and the quality average for rideshare is 23% in other urban areas and 22% in Sydney (both of which are unchanged from 2022).

Ratings for limousines and other hire vehicles are very similar in other urban areas compared to Sydney.

Figure 25: Strengths and weaknesses of transport options amongst those aware of the service in their region - Other Urban Q64



Base = Respondents aware of service in location [Taxis n=498; Rideshare n=439; Limo / Other n=373]

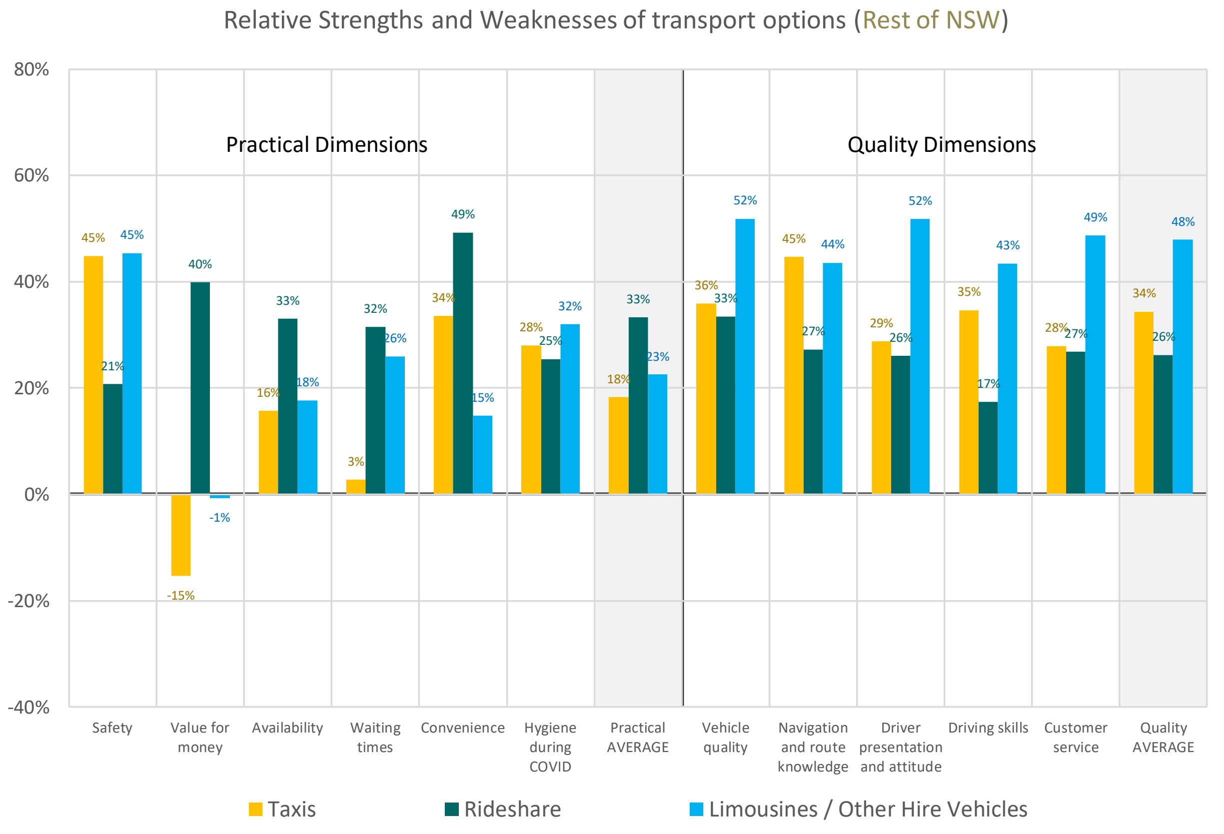
Charts show ‘differential’ scores calculated as ‘% strength’ minus ‘% weakness’

While Sydney and other urban areas have quite similar patterns, in the rest of NSW there has shown quite a different relatively, but this is less so the case in 2023.

In these areas, taxis have been viewed more similarly to limousines and other hire vehicles, and equal or ahead of rideshare on most facets other than *value, waiting times* and *customer service.* This resulted in rideshare having only a small lead on the practical average, and both taxis and limousines and other hire vehicles having higher quality averages than rideshare.

Interestingly though, even in the rest of NSW, where the penetration of rideshare services is lower, the perceived *availability* of rideshare *amongst those aware of them operating in their area* has changed from being on par with taxis in the 2019 survey to now being far ahead of taxis in 2023. A similar pattern has also been seen for *convenience*, which has also moved from being on par with taxis in 2019 to being a clear perceived strength for rideshare in 2023. As a result, rideshare has a larger led on the practical average score in 2023. Taxis remain ahead of rideshare on the quality dimension in 2023.

Figure 26: Strengths and weaknesses of transport options amongst those aware of the service in their region - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=384; Rideshare n=214; Limo / Other n=206]

Charts show 'differential' scores calculated as '% strength' minus '% weakness'

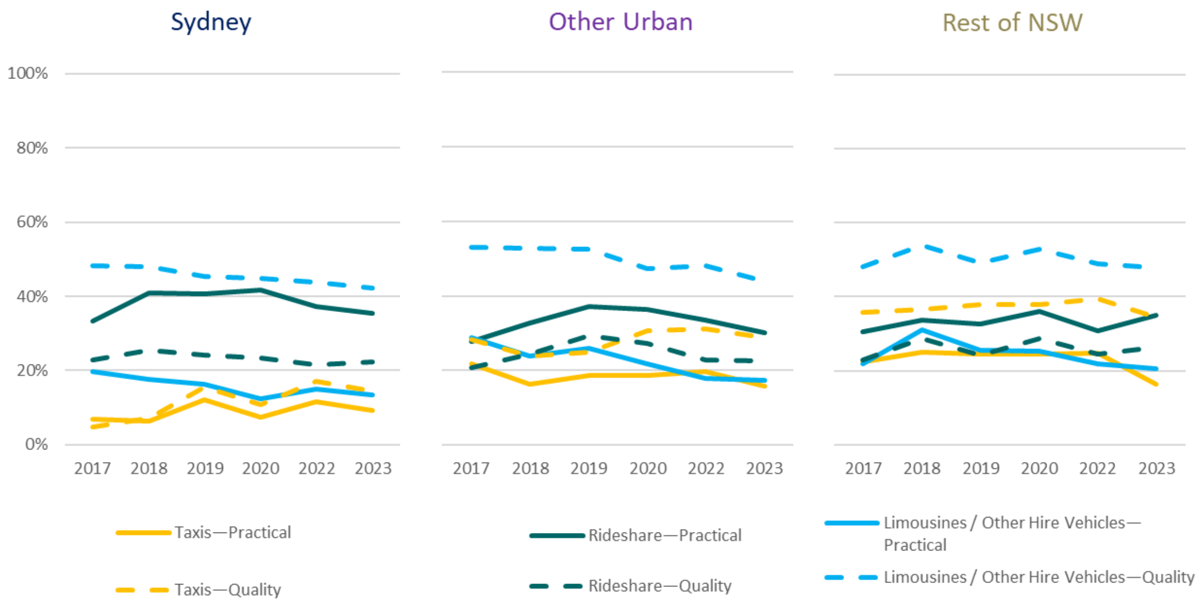
The tracking chart below shows the average of the practical dimensions and the quality dimensions for each area.

The macro patterns in these charts are:

- Rideshare consistently scores highest for practical dimensions (led by cost and convenience), and higher than it does on quality dimensions, but this has fallen from its high point in the period just before COVID-19. It scores higher than taxis on quality dimensions in Sydney, but lower outside Sydney.
- Limousines and other hire vehicles score highest on the quality dimensions, though this is declining. They now score similarly to taxis on the practical dimensions rather than higher.
- Taxis tend to score higher on quality than on practical dimensions – reversing the pattern of rideshare services on the two averages – but are still generally the lowest rated service on practical dimensions.

Perceptions of rideshare have fallen slightly since 2020. Perceptions of taxis in this time have been fluctuated a little more in Sydney, and fallen somewhat in the rest of NSW in 2023.

Figure 27: Changes in perceived strengths and weaknesses of transport options amongst those aware of the service in their region (average Practical Dimensions and Quality Dimensions scores) Q64

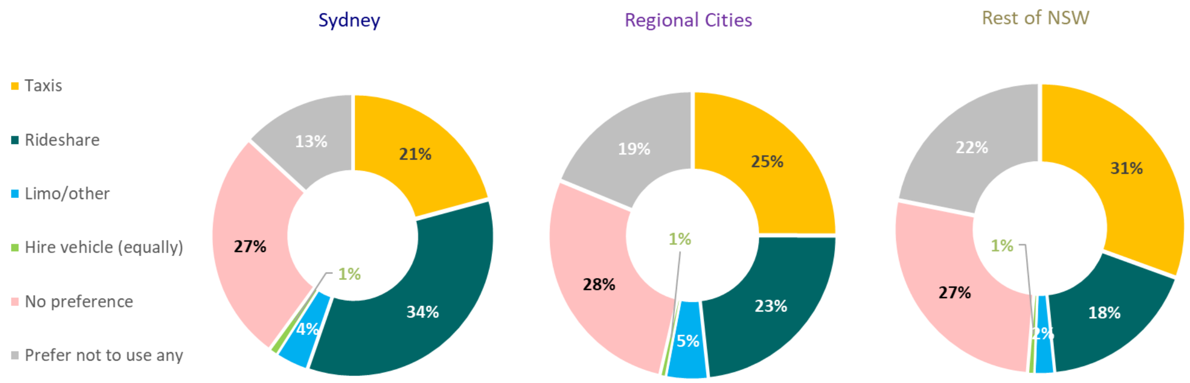


Preferences

In Sydney nearly twice as many respondents have a preference for any form of hire vehicle (39%) as have a preference for taxis (21%). In other urban areas these proportions are about equal (29% and 25% respectively), while in the rest of NSW many more respondents have a preference for taxis (31%) than do for hire vehicles (21%).

In all locations 27-28% of respondents reported having no preference either way, while 13-22% prefer not to use any of these point-to-point transport services. These figures were all at the lower end of their usual range in 2023.

Figure 28: Preferences for transport options Q65/66



Base = all respondents [Sydney n=2,030; Other Urban n=530; Rest of NSW n=416]

Preferred form of point-to-point transport *Sample size*	**Sydney** *2030*	**Other Urban** *530*	**Rest of NSW** *416*
Taxis	**21%**	**25%**	**31%**
Rideshare	34%	23%	18%
Limousine / Other hire vehicle	4%	5%	2%
Hire Vehicle (equally)	1%	1%	1%
Any form of Hire Vehicle	**39%**	**29%**	**21%**
No preference	27%	28%	27%
Prefer not to use any	13%	19%	22%

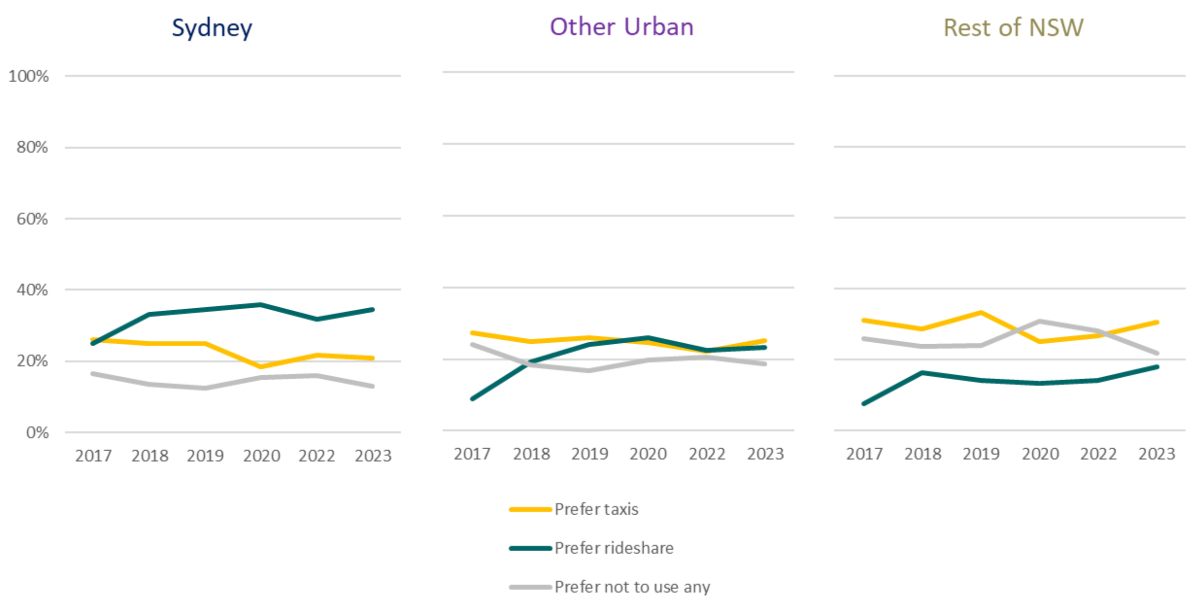
Consistent with other trends in awareness and usage in the survey, the preferences tracking charts show relatively stable results for taxis and differing emerging trajectories for rideshare across the three locations.

Preferences for rideshare increased fastest in Sydney, and have been relatively stable in the mid-30s since 2018. In the same time, preference for taxis has declined a few percent, with the broad pattern fairly consistent for the past three surveys.

In other urban areas preferences for rideshare grew from 2017 through to 2020, and has now been stable with and almost identical to taxis for the past four surveys. In the rest of NSW, preferences for rideshare jumped up a little in 2018, but did not sustain that growth in the same way as in other urban areas, and it remains steady at a level considerably below taxis. It is interesting to note that preferences for rideshare have increased a little in 2023, and alongside the stronger perceptions of rideshare availability and convenience in the rest of NSW in 2023, this could be an early indicator of a surge in rideshare use in these regions where it has previously been substantially lower.

The charts here also show those who prefer not to use *any* forms of point-to-point transport. This had shown a slight downwards movement from 2017 to 2019, suggesting that prior to the impact of COVID-19 that the collective range of point-to-point transport options available may have been appealing to a wider proportion of the community (ie: so that fewer had a preference to avoid point-to-point transport at all where possible). In all locations this proportion was somewhat higher again during the last two COVID-affected survey periods, but has trended slightly downwards in the 2023 survey. At present this figure is at the lower end of its usual range, and suggests that overall, point-to-point transport services are again appealing to a wider proportion of the total population.

Figure 29: Changes in preferences for transport options Q65/66

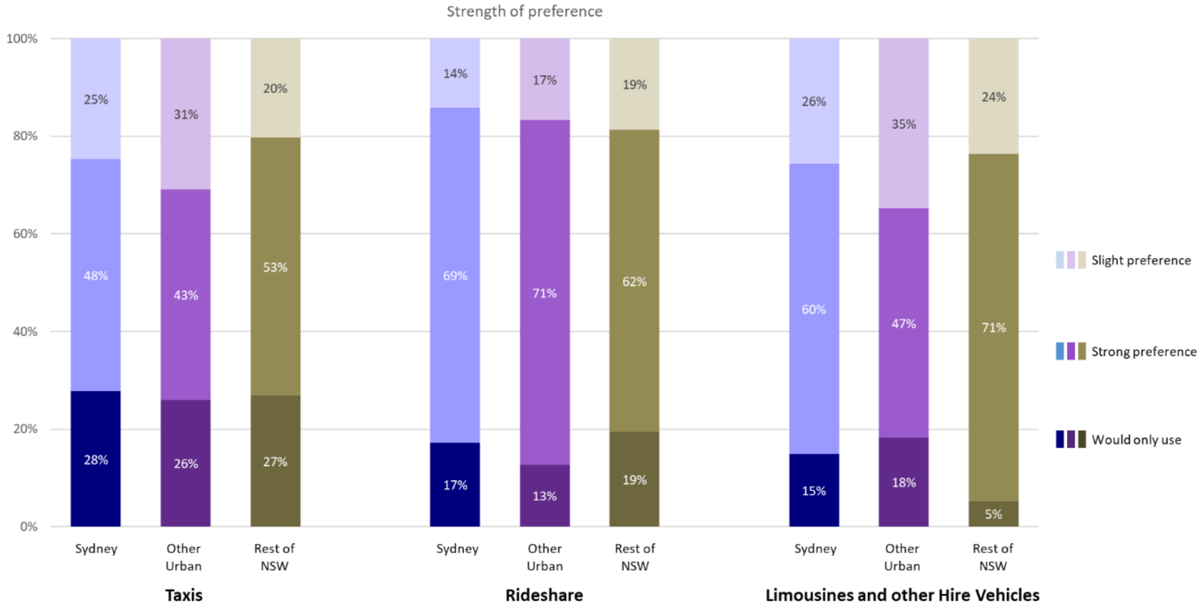


Strength of preference

There are generally slightly different patterns seen in the strength of preferences for taxis or for rideshare. These patterns continue to be seen within the groups who have different preferences, even as the relative size of those groups change.

People who have a preference for rideshare are most likely to describe this as *a strong preference,* and more use this description than of those who have a preference for taxis. Those who have a preference for using taxis are more likely to say they *will only use taxis,* but are also more likely to say they have only a *slight preference*.

Figure 30: Strength of preference for transport options amongst those who have a preference for one of taxis, rideshare or limousines / other hire vehicles Q67



Base = Have preference for taxis, rideshare or limos / other HVs [Sydney n=99-642; Other Urban n=28-132; Rest of NSW n=14-131]
Note small base size for limousines / other HV in rest of NSW.

Proportion of all respondents represented in chart: Sydney = 60%; Other Urban = 55%; Rest of NSW = 50% - the balance have no preference, or prefer not to use any of these forms of transport

Changes that May Increase Use

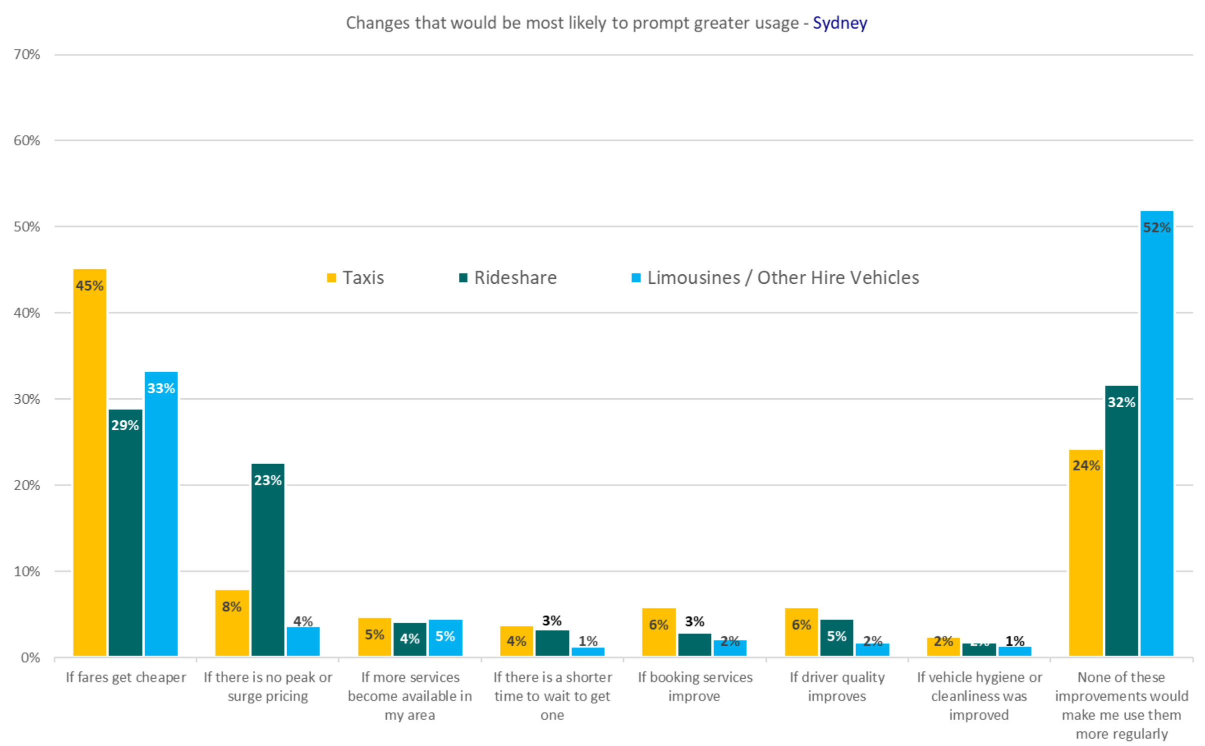
There have been no substantive movements in the type of changes respondents felt might make them likely to use point-to-point transport services more often, with responses holding very stable across all waves of the survey. In the COVID-affected surveys slightly more respondents said that *nothing would make them use point-to-point transport more regularly*, but in 2023 those proportions are back to being very similar to 2019.

24%-36% of respondents across the different regions in 2023 said that nothing would get them to use taxis more often, with the equivalent figures for rideshare being 8%-12% higher, and then considerably higher again for limousines and other hire vehicles. For each type of service, willingness to consider increasing usage remains highest in Sydney.

Factors relating to cost remain the most likely to prompt increased usage of any of the types of point-to-point transport. Cost (or perceived value) is a key factor on which rideshare seems differentiated from taxis throughout the survey, and that strongly comes through in this result too. While taxis are least likely for respondents to say they would not consider using them more regularly, *if fares get cheaper* remains an especially dominant and singular factor for taxis.

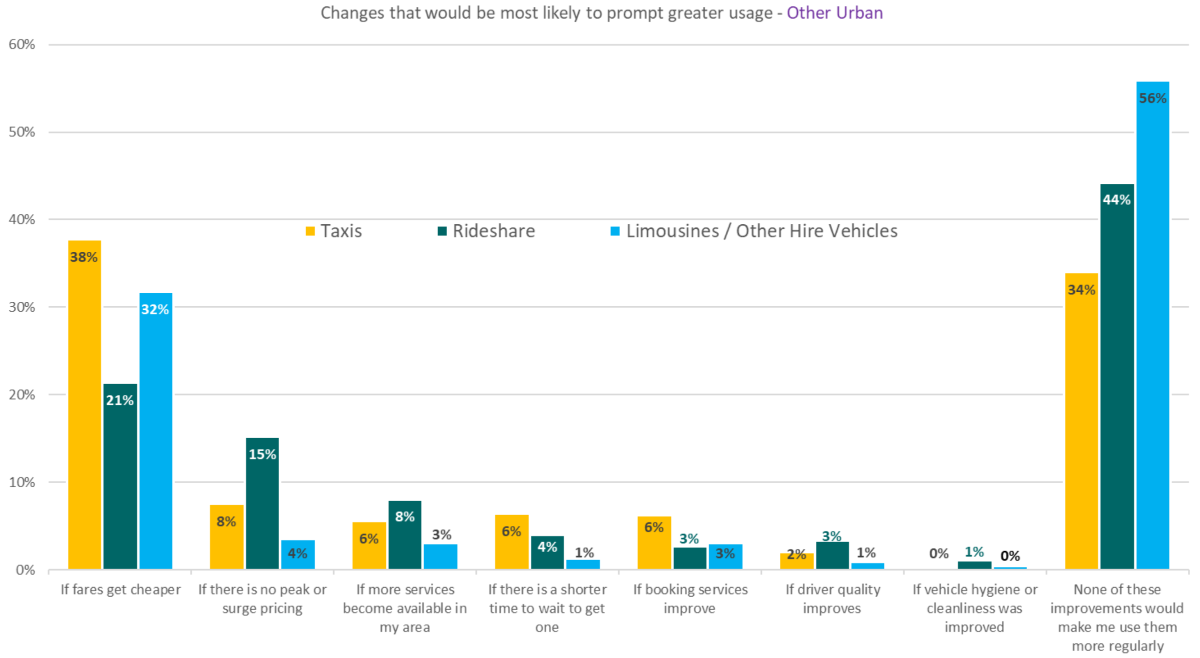
For rideshare services, *surge or peak pricing* is also identified as a barrier in Sydney and Other Urban areas.   *Availability* of rideshare services remains a barrier in other urban areas and the Rest of NSW. These patterns are all as have been seen previously, though over time availability has become less of an issue in other urban areas.

Figure 31: Changes which may prompt greater use of transport services – Sydney Q68



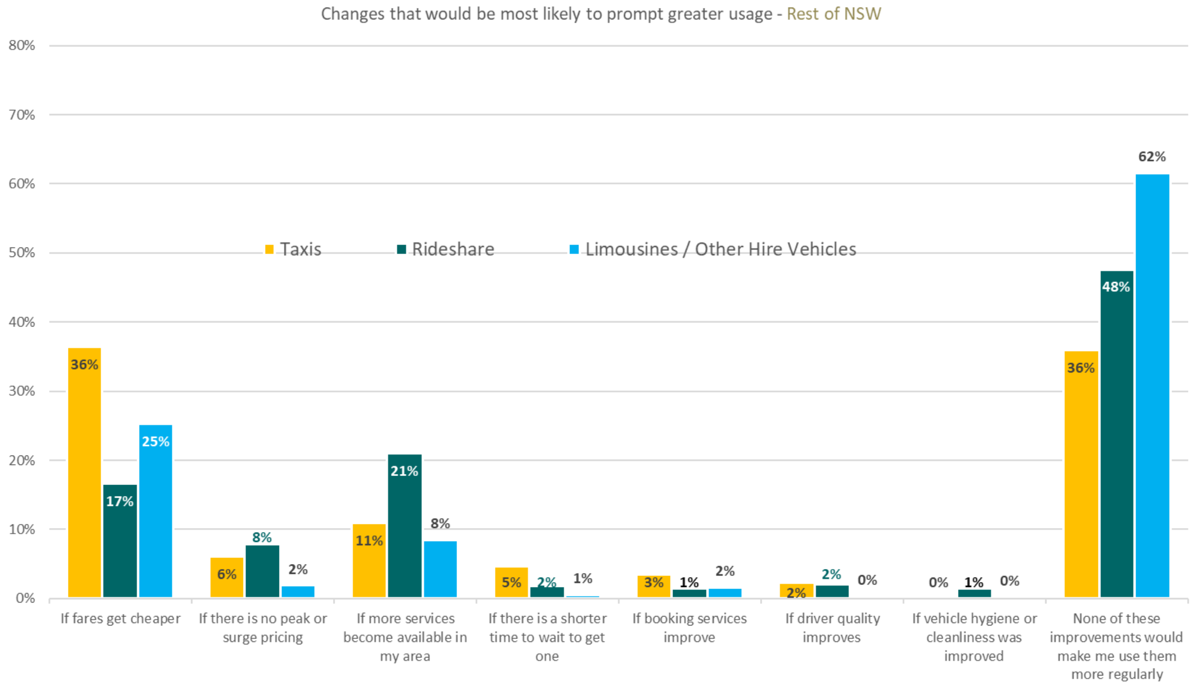
Base = All respondents [Sydney n=2,030]

Figure 32: Changes which may prompt greater use of transport services – Other Urban Q68



Base = All respondents [Other Urban n=530]

Figure 33: Changes which may prompt greater use of transport services – Rest of NSW Q68



Base = All respondents [Rest of NSW n=416]

C. Perceived Value for Money

As in previous years, overall rideshare is seen as offering better value for money than taxis, with limousines and other hire vehicles unsurprisingly least likely to be rated as *good or ok* value. This is especially the case in Sydney, but the rank order holds for all locations. Even in other urban areas and the rest of NSW, where the proportions who rate the value of both services as *good or ok* are not greatly different, many more rate the value of taxis as *poor* than do so for rideshare.

The pattern of green and pink shading in the 2023 table suggests that respondents in other urban areas are somewhat more positive about the value of both taxis and rideshare compared to the 2022 survey, while the perceived value of limousines or other hire vehicles outside of Sydney is seen as somewhat lower.

Figure 34: Summary of perceptions of value for money by time of trip amongst those aware of the service in their region Q20/21

		Taxis			Rideshare			Limousines or other hire vehicles		
		Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	Sample size	*1988*	*497*	*382*	*1929*	*437*	*223*	*1551*	*376*	*202*
Overall	**Good + OK**	**52%**	**52%**	**51%**	**69%**	**58%**	**56%**	**29%**	**33%**	**31%**
	Poor	36%	26%	30%	13%	12%	14%	14%	17%	17%
	Differential	*15%*	*26%*	*21%*	*56%*	*47%*	*43%*	*15%*	*17%*	*14%*
During the day, and before 10pm	**Good + OK**	**53%**	**51%**	**51%**	**67%**	**56%**	**55%**	**27%**	**31%**	**30%**
	Poor	29%	18%	24%	12%	11%	13%	15%	14%	15%
	Differential	*24%*	*33%*	*27%*	*55%*	*45%*	*42%*	*13%*	*17%*	*16%*
After 10pm - Sunday to Thursday	**Good + OK**	**38%**	**34%**	**34%**	**52%**	**42%**	**47%**	**22%**	**24%**	**24%**
	Poor	35%	28%	31%	21%	20%	16%	16%	16%	15%
	Differential	*3%*	*6%*	*3%*	*31%*	*22%*	*32%*	*6%*	*8%*	*9%*
After 10pm - Friday and Saturday	**Good + OK**	**33%**	**30%**	**31%**	**44%**	**37%**	**42%**	**22%**	**23%**	**24%**
	Poor	39%	32%	36%	30%	25%	21%	15%	17%	16%
	Differential	*-6%*	*-1%*	*-5%*	*14%*	*12%*	*21%*	*7%*	*7%*	*7%*
For short trips (under 5km)	**Good + OK**	**53%**	**54%**	**48%**	**66%**	**58%**	**54%**	**23%**	**26%**	**27%**
	Poor	33%	23%	32%	15%	11%	12%	20%	20%	18%
	Differential	*19%*	*31%*	*17%*	*51%*	*47%*	*42%*	*3%*	*6%*	*9%*
For long distances (over 15km)	**Good + OK**	**41%**	**37%**	**32%**	**59%**	**47%**	**46%**	**27%**	**35%**	**28%**
	Poor	41%	34%	36%	19%	18%	14%	16%	15%	19%
	Differential	*0%*	*4%*	*-5%*	*40%*	*30%*	*32%*	*11%*	*19%*	*9%*

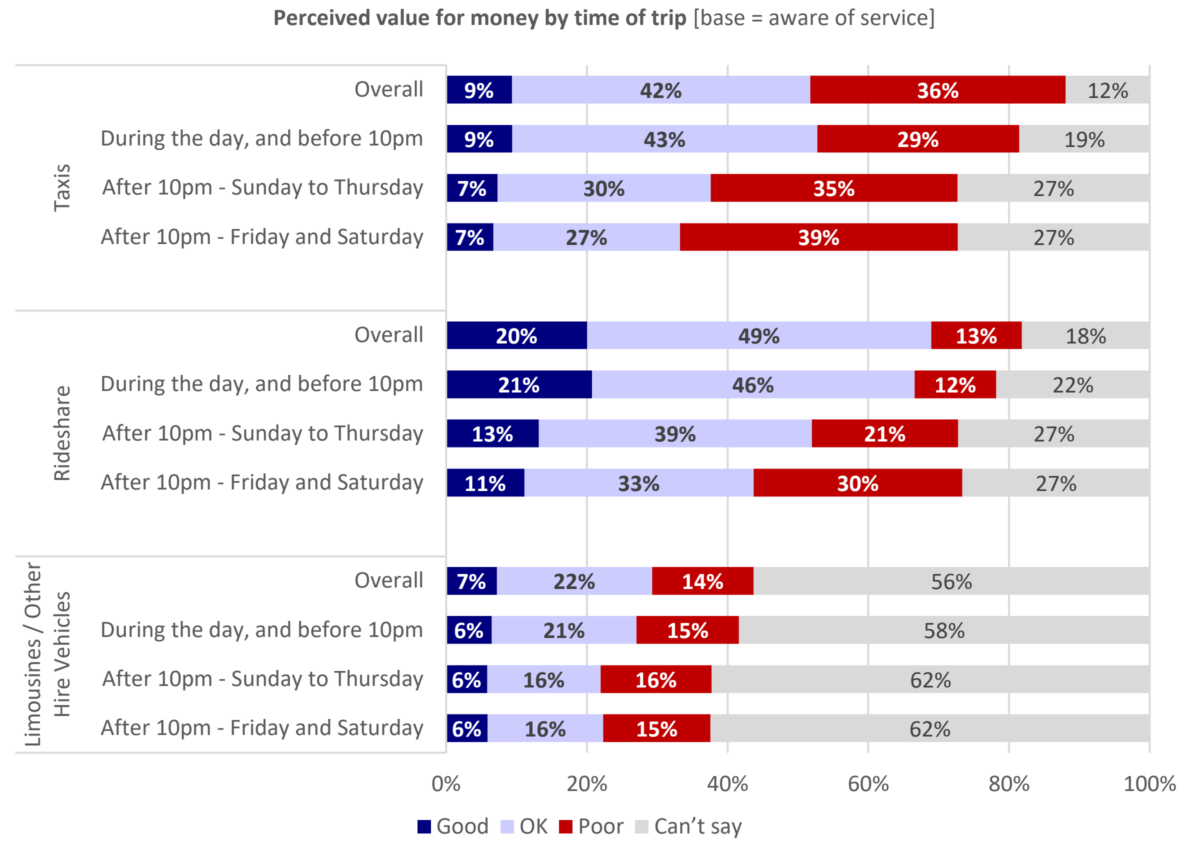
* **Differential = % (good + OK) minus % (poor). The higher the differential, the better the perceived value.**

Note: differentials are based on results to one decimal place, and may look different to the rounded whole numbers shown in the table

Cells highlighted green are >5% more positive in 2023 compared to 2022. Cells highlighted pink are >5% less positive in 2023.

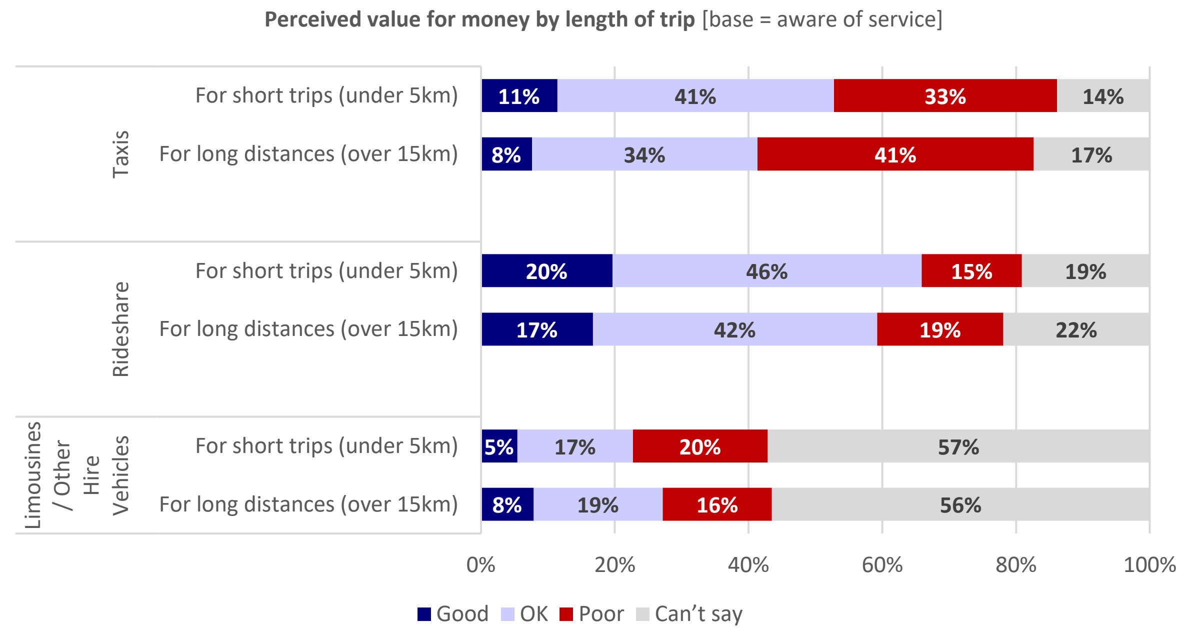
Sydney

Figure 35: Perceptions of value for money by time of trip amongst those aware of the service in their region (Sydney) Q20



Base = Aware of Service [Taxis n=1,989; Rideshare n=1,927; Limo / Other n=1,588]

Figure 36: Perceptions of value for money by length of trip amongst those aware of the service in their region (Sydney) Q21



Base = Aware of Service [Taxis n=1,989; Rideshare n=1,927; Limo / Other n=1,588]

Other Urban

Figure 37: Perceptions of value for money by time of trip amongst those aware of the service in their region (Other Urban) Q20

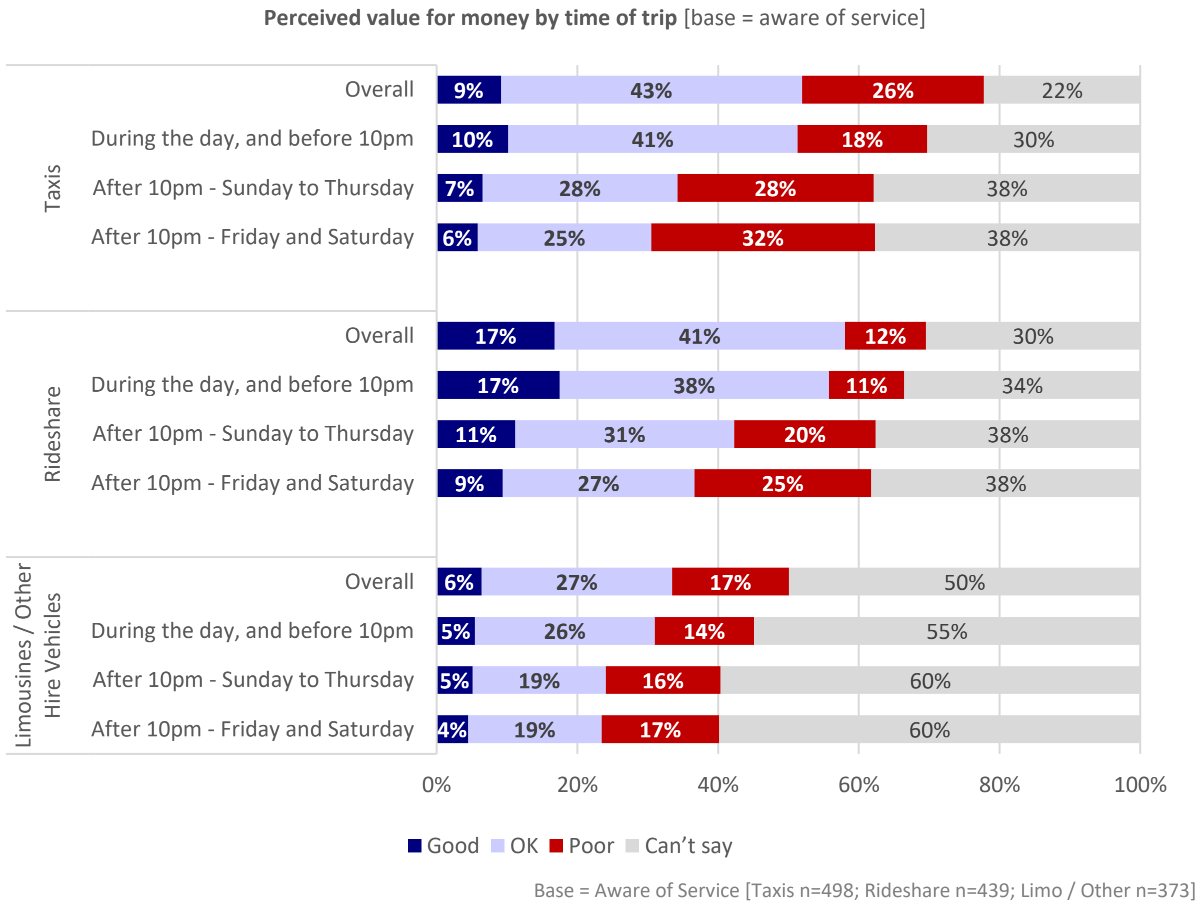
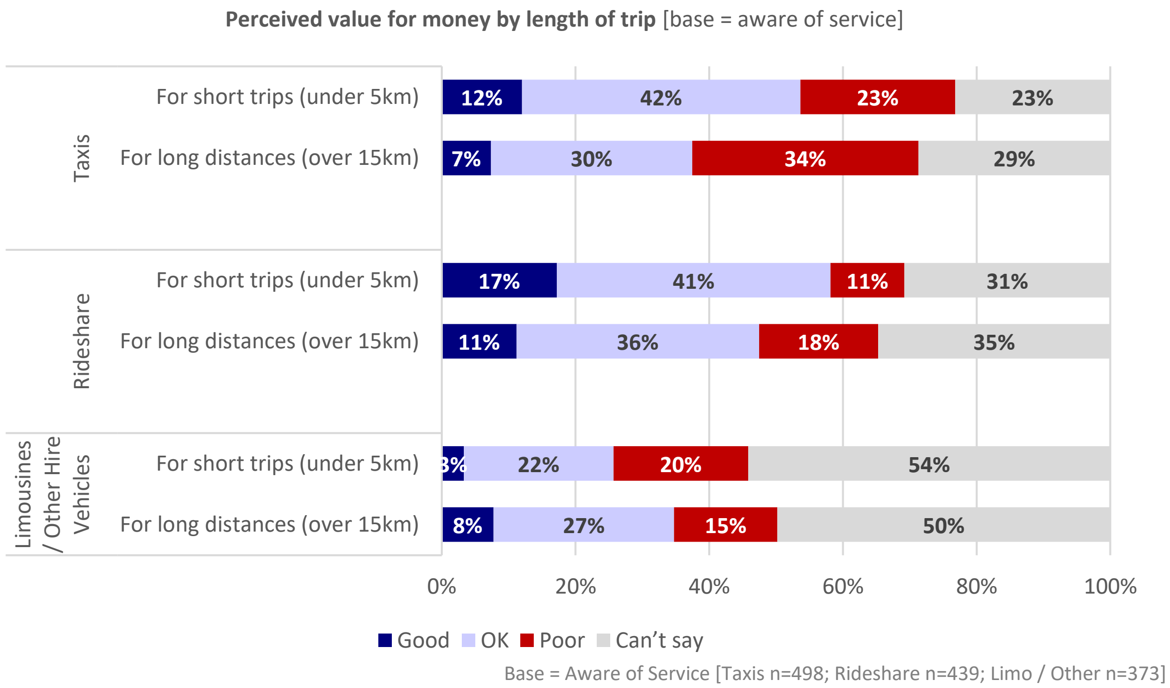


Figure 38: Perceptions of value for money by length of trip amongst those aware of the service in their region (Other Urban) Q21



Rest of NSW

Figure 39: Perceptions of value for money by time of trip amongst those aware of the service in their region (Rest of NSW) Q20

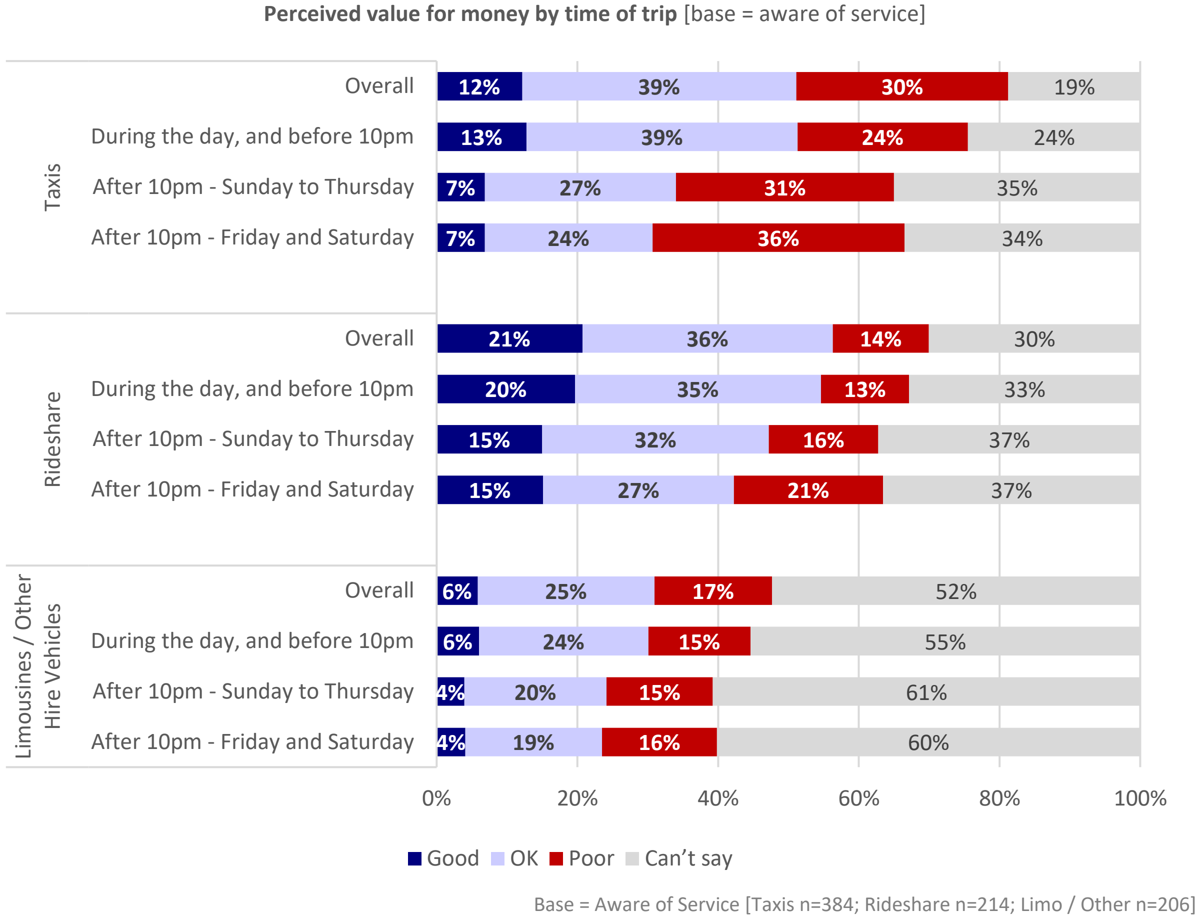
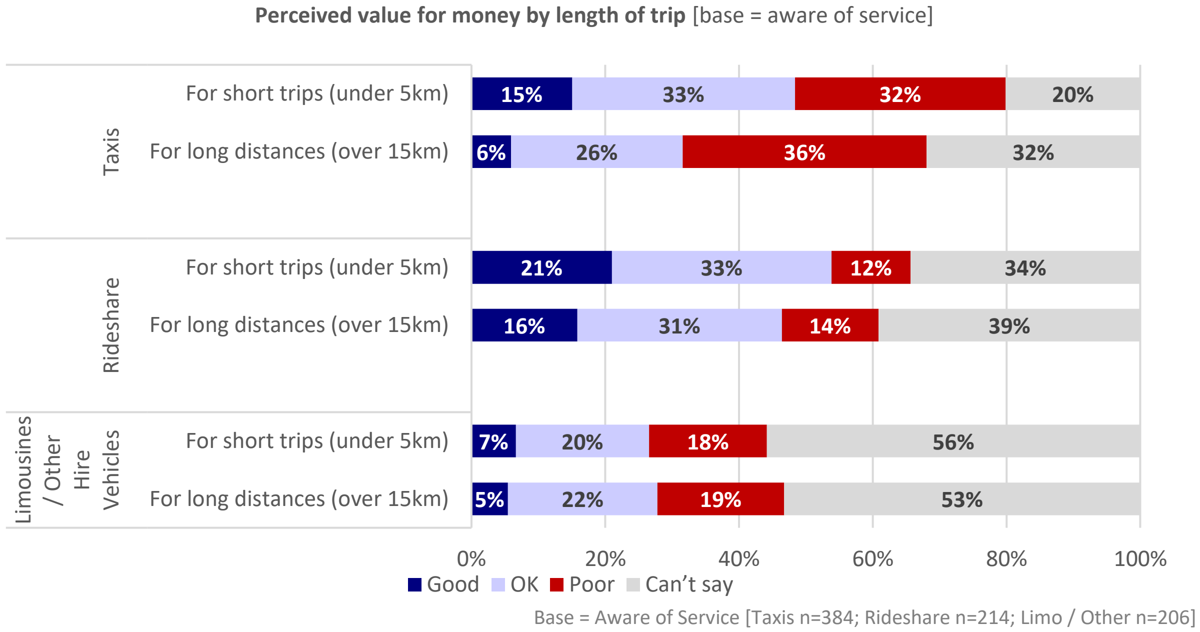


Figure 40: Perceptions of value for money by length of trip amongst those aware of the service in their region (Rest of NSW) Q21



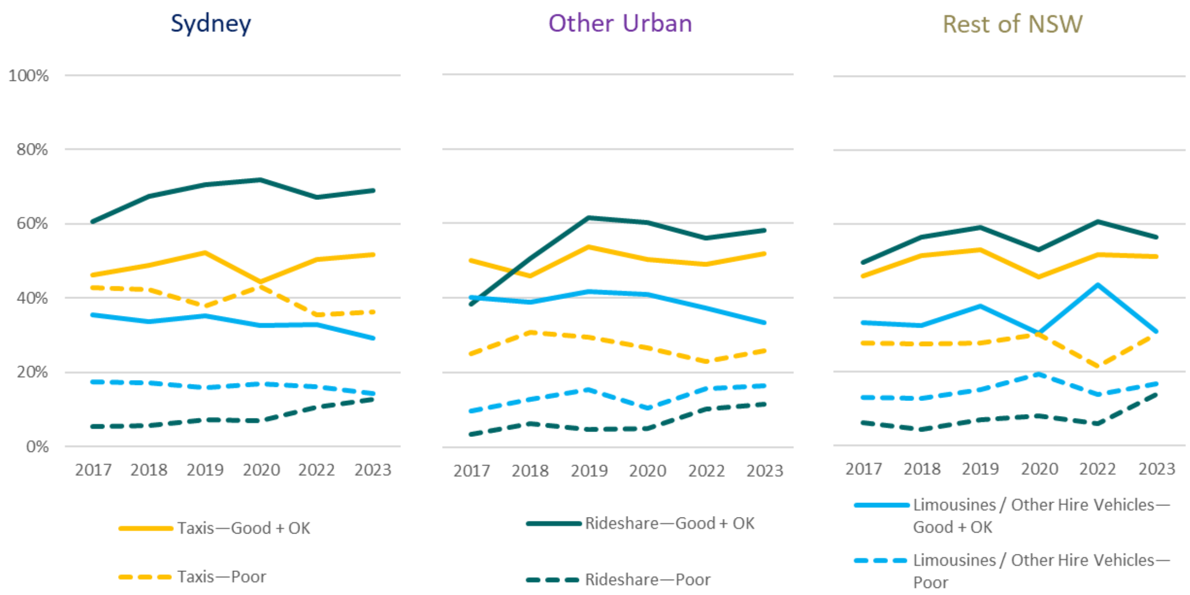
The tracking chart shows changes in perceptions of overall value over time.

There are some commonalities across locations, but also differences. The biggest commonalities are that rideshare is consistently seen as the best value for money service; and that there are much larger proportions who consider taxis to be *poor* value. This is common across all areas, with limousines and other hire vehicles least likely to be seen as *good or ok* value, but also less likely than taxis to be seen as *poor* value.

There are several noteworthy nuances across locations.

- The biggest differential between the value of rideshare and taxis is seen in Sydney, though this has closed from the very large gap seen in 2020. Outside of Sydney there is much less of a difference in value for money (despite 'value' still being much more likely to be seen as a strength of rideshare in those locations).
- The shape of the rideshare value tracks in Sydney and other urban areas is very similar, dropping a little from its peak during COVID, and then bouncing back a little in 2023.
- The perceived value of taxis is similar across locations, other than a greater proportion of respondents from Sydney feeling that they are *poor* value for money.

Figure 41: Change in perceptions of OVERALL value for money amongst those aware of the service in their region Q20



Impact of Minimum Rank & Hail Fares

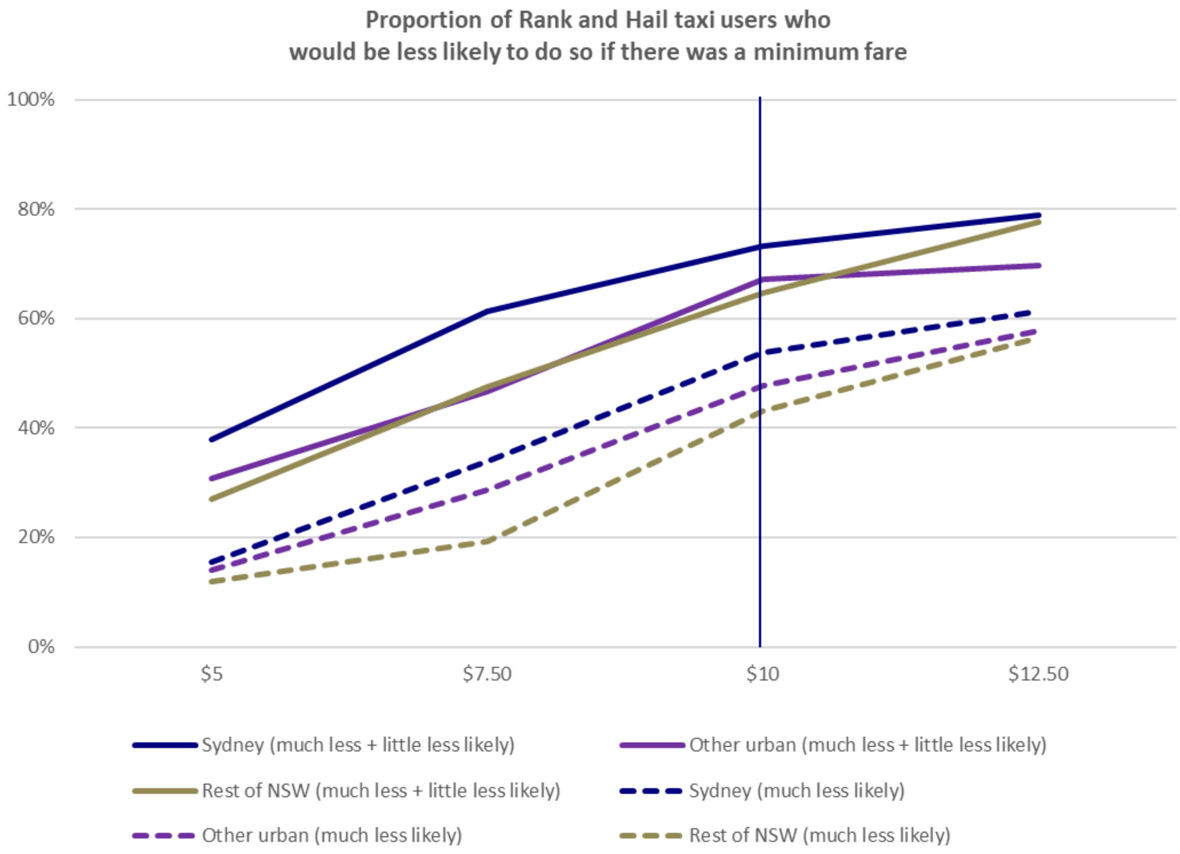
The overall sensitivity of those who use rank and hail taxis to a minimum fare has not changed substantively across the five surveys where these questions have been asked, but there are some nuances in each year.

In 2018 and 2019 sensitivity was very similar across locations. In 2020 the rest of NSW region was the most sensitive and other urban areas the least sensitive to the concept of minimum fares. In 2022 the rest of NSW was the *least* sensitive, and Sydney respondents were by a small margin the most sensitive – and this pattern was repeated in 2023.

Likely decline in use of rank and hail taxis still peaks at around 70-80% of users saying they would feel less likely to use them if there was a minimum fare in the $10 - $12.50 range, and this pattern and magnitude has not changed in the time while this data has been collected.

As noted in previous reports, survey responses about anticipated behaviour changes as a result of hypothetical scenarios should be treated indicatively rather than as a quantitative predictor of the magnitude of any change. However, the patterns can show how respondents view different levels of changes and identify sensitivities, and these questions have shown that respondents have a fairly consistent view of how they expect that minimum fares may impact their use of rank and hail taxis.

Figure 42: Likely impact of a minimum fare on use of Rank and Hail taxi users Q27



Base = Used or tried to use rank and hail taxis within the last 6 months [Sydney n=545; Other Urban n=71; Rest of NSW n=45]

D. Methods of Obtaining Transport Services

The *relative patterns* in ways respondents report getting specific types of point-to-point transport services have remained quite consistent across the 2017-2023 surveys.

- In Sydney in 2023 all four methods of obtaining a vehicle are still similarly common amongst taxi users, but outside of Sydney ASAP bookings are by far the most common method used.
- Rideshare services are most commonly obtained by ASAP bookings.
- Limousines and other hire vehicles are most commonly pre-booked, rather than ASAP bookings (and less likely to be ASAP booked than rideshare is to be pre-booked).

Figure 43: Prevalence of methods of obtaining transport in the population Q22

Base = all respondents [Sydney n=2,030; Other Urban n=530; Rest of NSW n=416]

% of population		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	15%	8%	17%
	ASAP booked	17%	17%	23%
	Rank	19%	11%	11%
	Hail	18%	5%	4%
Rideshare	Pre-booked	20%	7%	6%
	ASAP booked	**44%**	**25%**	15%
Limousines and other hire vehicles	Pre-booked	8%	7%	4%
	ASAP booked	2%	1%	1%

Figure 44: Prevalence of methods of obtaining transport amongst recent users Q22

Base = Used transport type within the last 6 months [Sydney n=183-1034; Other Urban n=44-168; Rest of NSW n=18-138]

% of users (last 6 months)		Sydney	Other Urban	Rest of NSW
Taxis	Pre-booked	33%	28%	47%
	ASAP booked	38%	**61%**	**62%**
	Rank	43%	39%	31%
	Hail	41%	19%	12%
Rideshare	Pre-booked	36%	22%	32%
	ASAP booked	**80%**	**87%**	**78%**
Limousines and other hire vehicles	Pre-booked	**84%**	**88%**	73%
	ASAP booked	20%	14%	27%

Note that multiple responses are allowed, so columns will not sum to 100%.

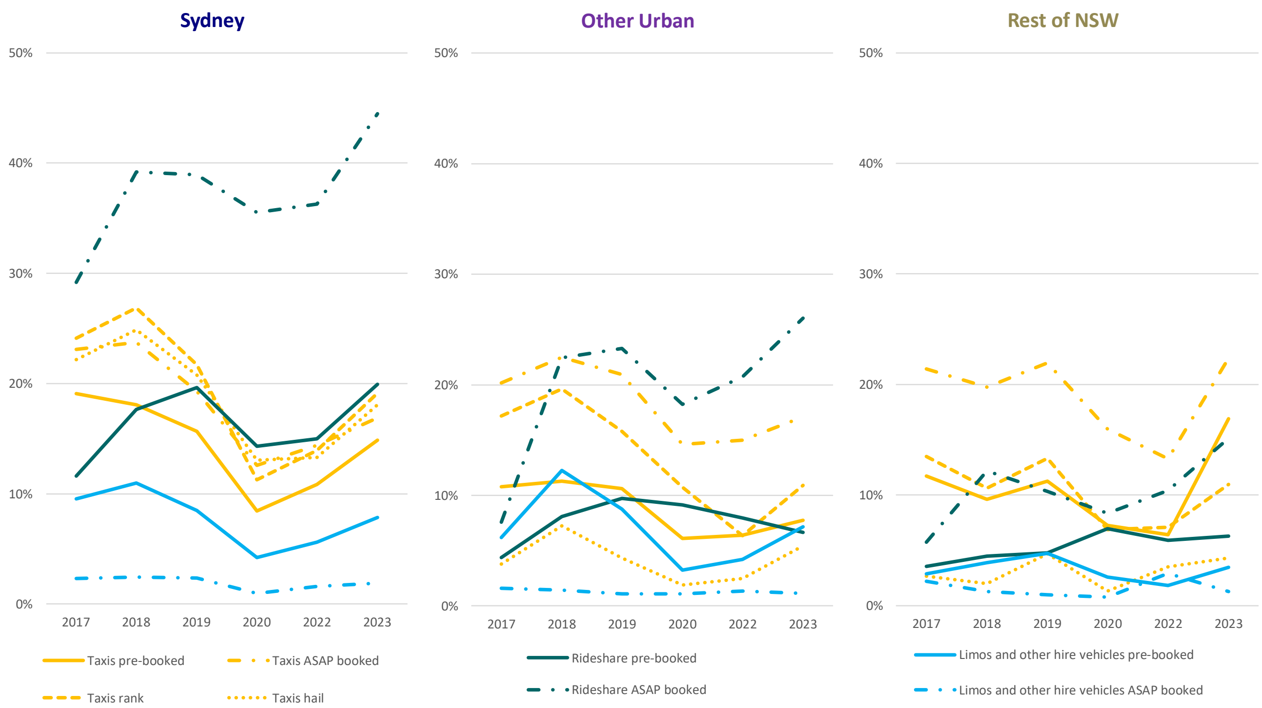
There are two tracking charts here. The first (A) shows the changes in the prevalence of each of these different methods of obtaining point-to-point transport in the population (ie: not just amongst users), while the second (B) shows the proportions for recent users (ie: it is the proportional breakdown of use, regardless of the total volume of use in the population).

The population level tracking chart (A) clearly shows the dip in total usage seen across the COVID-19 period, and then the return to greater use of point-to-point transport in 2023. The shape of the curves for the different methods used for each type of transport are suggestive that it is the absolute levels of use that is changing, but less so the relative prevalence of different methods of obtaining transport.

The green lines in the population level chart show the rapid increase in use of rideshare, at least through to 2019 before COVID arrived. The differences between the green dotted line for ASAP bookings versus the green solid lines for pre-bookings show the steady preference for ASAP bookings for rideshare.

By comparison, the falling yellow lines show the decline in overall use of taxis has been seen across all the different ways that they can be obtained. If anything, the decline in the use of ranks has been slightly greater, but only to a small extent and this was likely reflective of practices during COVID, as this has bounced back as strongly as any other method in Sydney and in other urban areas in 2023.

Figure 45: A - Changes in prevalence of methods of obtaining transport in the population Q22



The charts that show proportional use of the different methods of obtaining point-to-point transport just amongst recent users (B) reinforces the sense that the relative use of different methods did not vary as dramatically through COVID as did the absolute volume of use (see next page).

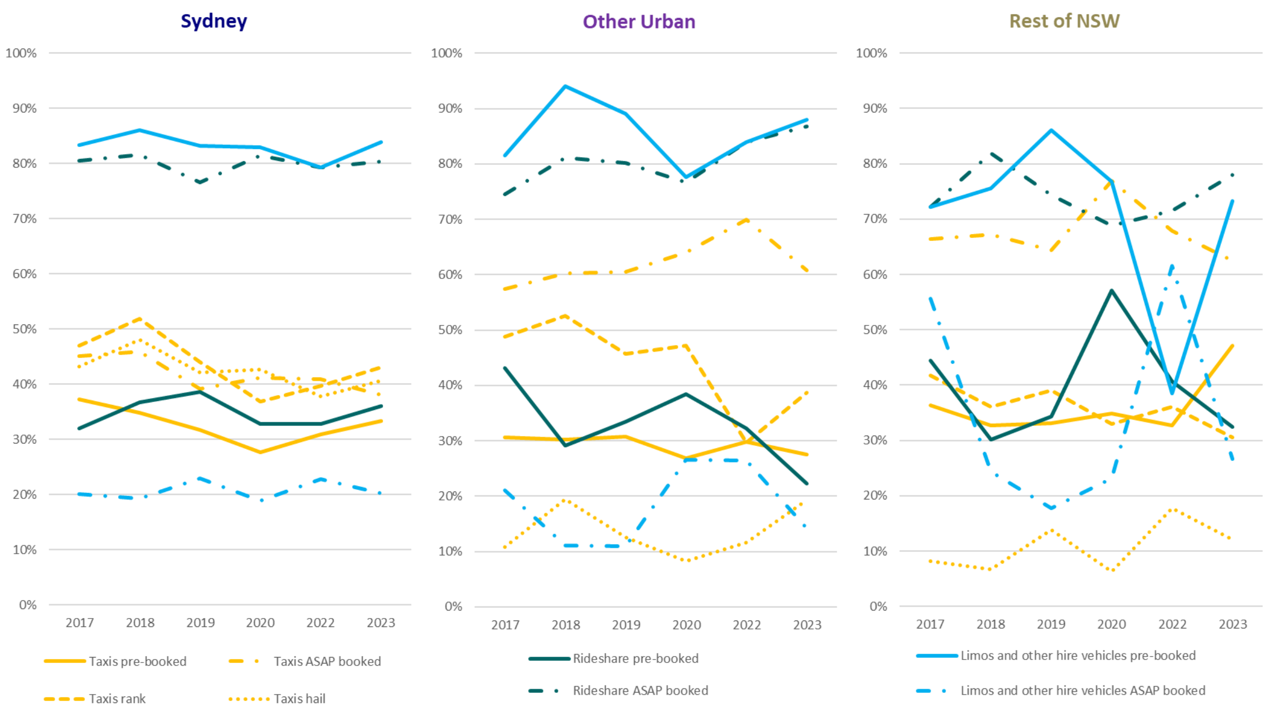
In Sydney particularly, the relative use of different methods is not substantially different in 2023 than it has been at any time. In the population-level charts the dip in use of methods in 2020 and

2022 indicates fewer people were using point-to-point transport. In the context of the user-level charts, the similar but much smaller simultaneous dips in use of different methods of obtaining vehicles would be more reflective of people using fewer different ways of getting them in the six month period and/or making fewer trips in that time.

In other urban areas, there are more structural changes that can be seen. For taxis, the use of ranks has trended downwards since 2017 (notwithstanding the higher figure seen in 2023). The bigger difference though is seen in rideshare, with the proportion of ASAP bookings trending upwards and pre-bookings trending downwards.

For limousines and other vehicles, the preponderance of pre-bookings can be readily seen in the solid blue line. Outside of Sydney it can be seen that ASAP bookings became more common during COVID, but that this balance has largely returned to normal in 2023.

B - Changes in prevalence of methods of obtaining transport amongst usersQ22



Waiting Times

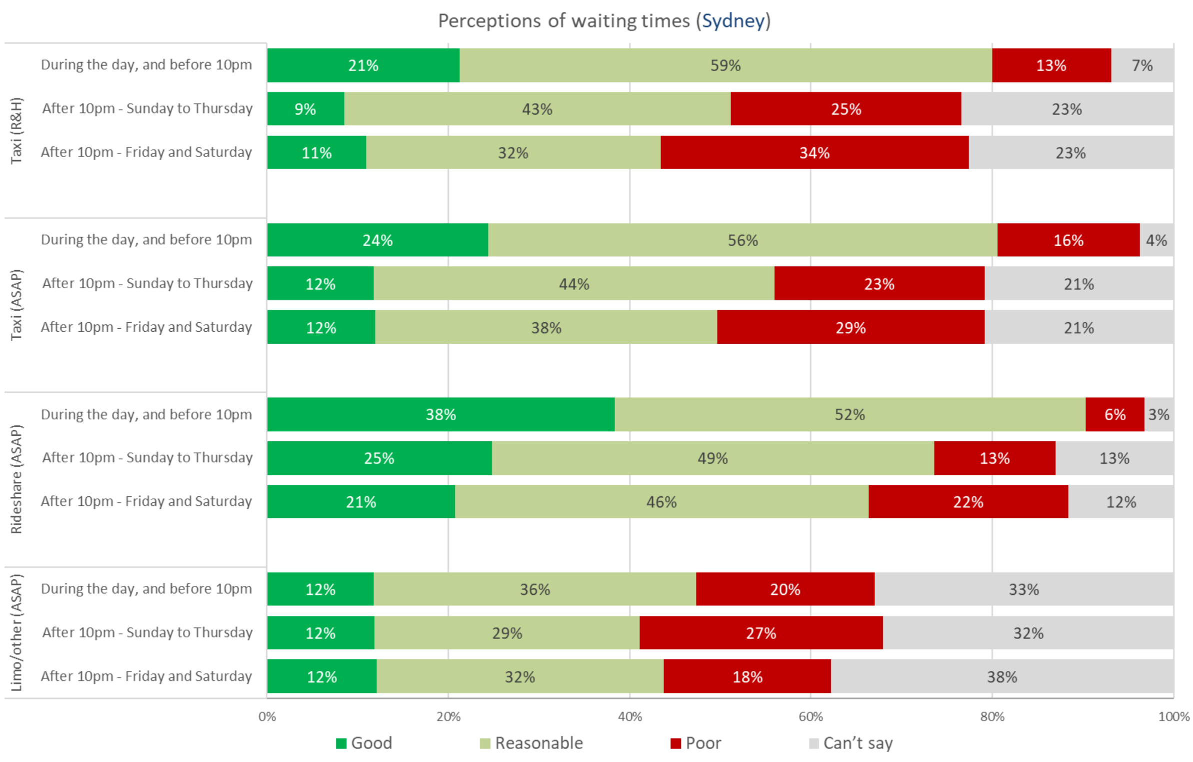
As would be anticipated, perceived waiting times are typically somewhat poorer after 10pm, across all days, transport types and locations. In 2023 there is clearly a perception that waiting times are poorest after 10pm on Friday and Saturday nights – and 2023 is the most consistently that pattern has been seen.

There are several other general observations about waiting times which have been consistently seen:

- Rideshare waiting times continue to be viewed more favourably than taxi waiting times.
- There is little perceived distinction between rank and hail taxi waiting times and ASAP booking waiting times – but if anything waiting times for ASAP bookings are felt to be a little better than rank and hail, particularly in other urban areas.
- Perceptions of waiting times are more similar than dissimilar across locations.

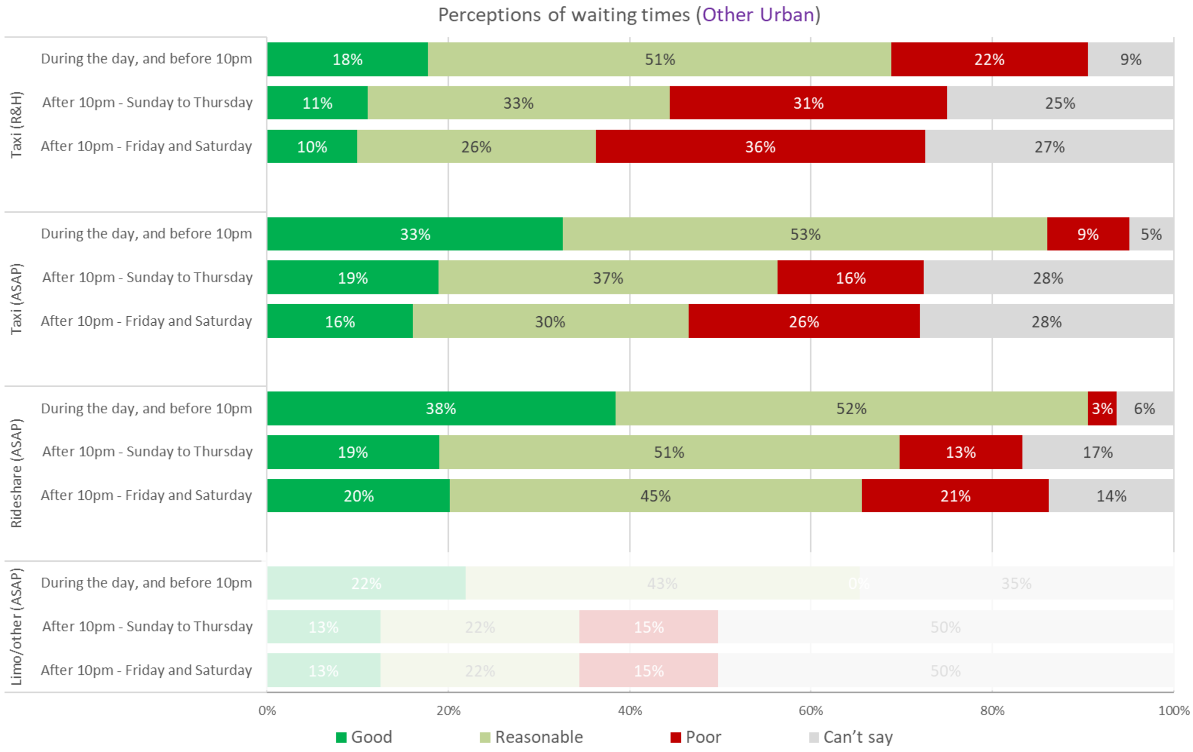
In 2023 a somewhat higher proportion of point-to-point transport users in Sydney and the rest of NSW felt waiting times were *poor* across all times and services than was seen in previous years, while this was not seen in other urban areas.

Figure 46: User perceptions of waiting times (Sydney) Q23-26



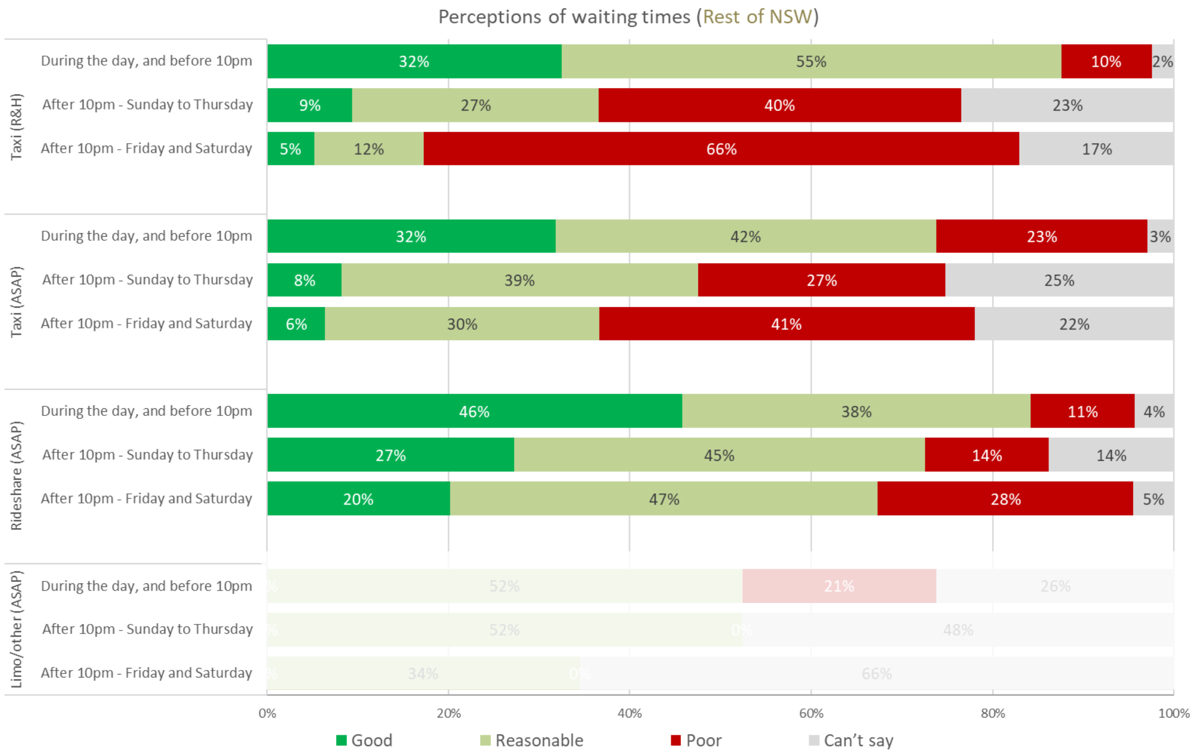
Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=545; Taxi ASAP n=332; Rideshare ASAP n=831; Limo / Other ASAP n=34]

Figure 47: User perceptions of waiting times (Other Urban) Q23-26



Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=71; Taxi ASAP n=90; Rideshare ASAP n=144; Limo / Other ASAP n=7*]

Figure 48: User perceptions of waiting times (Rest of NSW) Q23-26

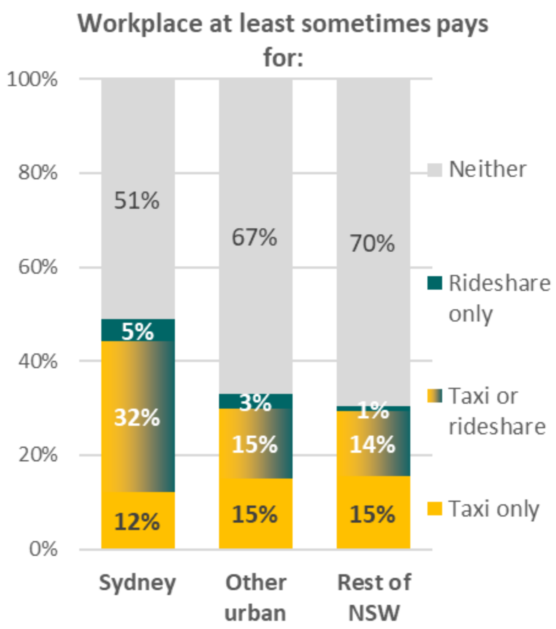


Base = Used method of getting transport type within the last 6 months
[Taxi R&H n=45; Taxi ASAP n=91; Rideshare ASAP n=52; Limo / Other ASAP n=5*]

* Results from sample sizes below n=30 are greyed out and should be interpreted with caution

E. Workplace Policies

Figure 49: Workplace paying for transport Q32



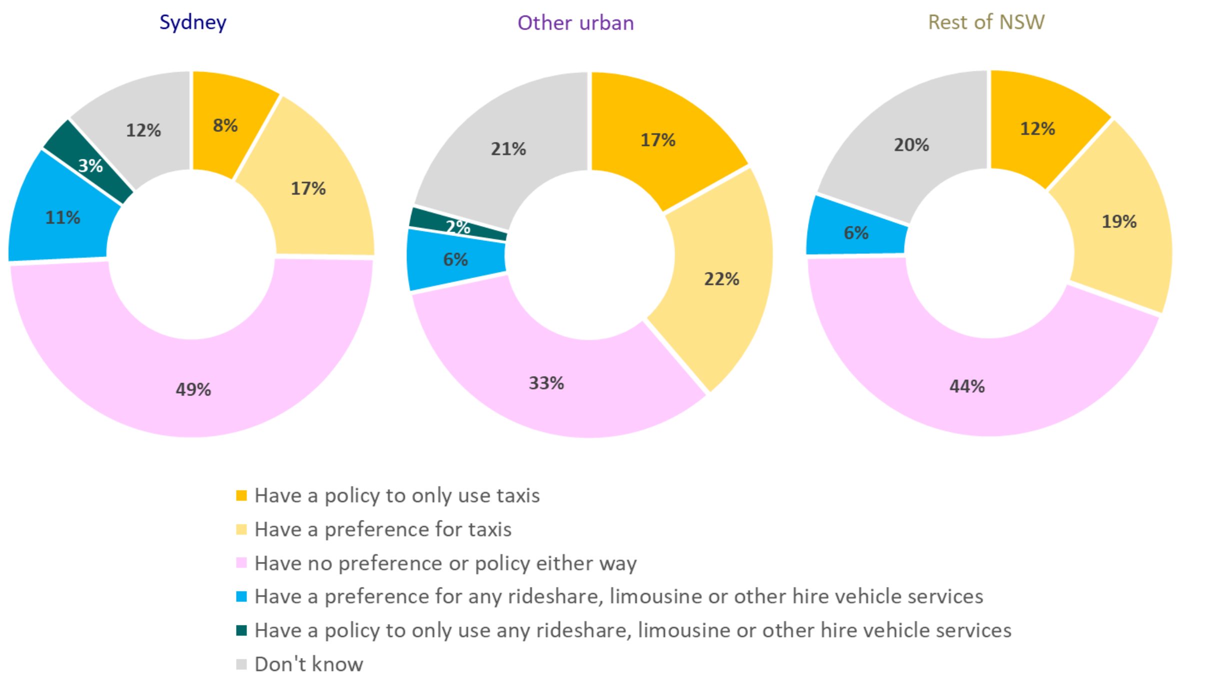
Just under half of all employed Sydney respondents (49%) said that their employer at least sometimes pays for employees to use point-to-point transport (this figure has been between 49% and 54% for the past five surveys). These proportions are usually lower in the other locations, being 33% in other urban areas and 30% in the rest of NSW in 2023.

Where employers *did* pay for transport, as in previous years almost all at least sometimes pay for taxis – either only taxis or in combination with rideshare – while very few pay for rideshare use only, and not taxis (just 1%-5%, consistent with previous years and not significantly increasing).

Much larger proportions pay for taxis only (12%-15% - also not substantively changing over the survey timeframe).

Employers are still more likely to have a policy or a preference to use taxis than rideshare, where a preference or policy is known to exist, but this preference seems to have diminished in Sydney in 2023. 25% felt their employer had a preference for taxis in (down from 30%+ in previous surveys), while the proportion who felt their employer had no policy or preference either way was 49% (compared to being more usually in the low 40s). The proportion with a preference or policy for rideshare or other hire vehicles is not changed though, at 14% in 2023 and in a similar range as previously seen. Figures for outside Sydney are not substantively different to that seen in previous surveys.

Figure 50: Workplace policies and preferences on paying for transport Q34



Base = Workplace at least sometimes pays for transport [Sydney n=662; Other Urban n=110; Rest of NSW n=68]

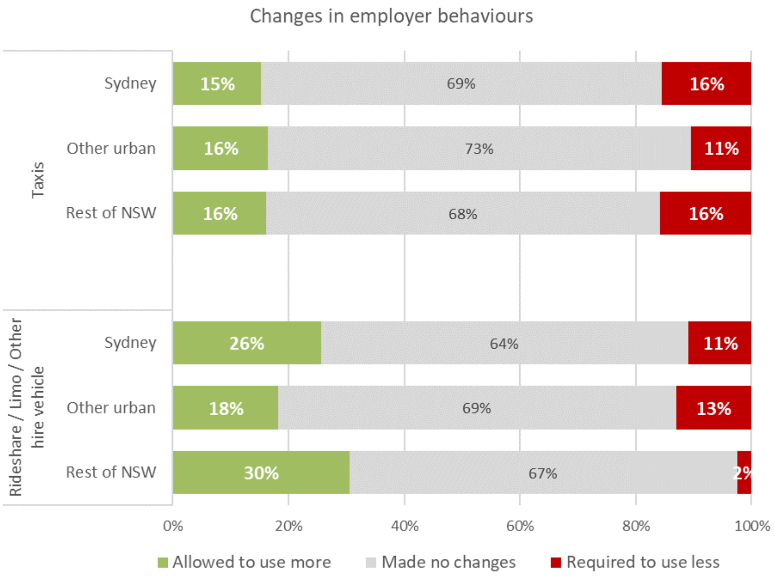
Employer policies which tend to favour taxis may result in a small number of respondents using taxis for work purposes despite having a personal preference for using rideshare. Across all locations 3-6% of employed respondents had a preference for rideshare, but an employer who only paid for employees to use taxis. Less than 1% had a preference for taxis, but an employer who only paid for hire vehicles.

Change in employer behaviours

While respondents perceive that their employers are more likely to pay for employees to use taxis than 'hire vehicles'[2], and to have policies and preferences that are more positive towards taxis – they have also consistently indicated that they see increasing use of hire vehicles.

In Sydney 15% of employed respondents felt their employer has allowed more use of taxis in the last 12 months, while 16% that their employer required them to use taxis less – a nett differential of -1%. Outside of Sydney the nett differential for taxis has been neutral or positive for the past two surveys. For rideshare, in all locations the nett differentials remain strongly positive, though still much lower in Sydney and other urban areas since the impact of COVID-19.

Figure 51: Changes in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



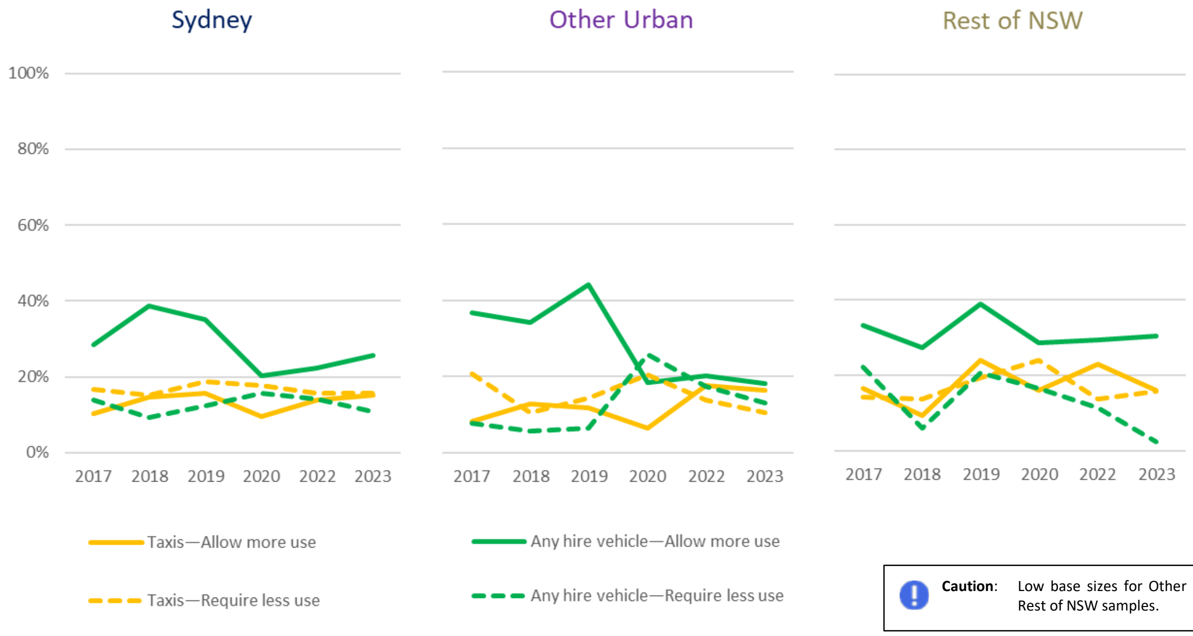
	2023	2022	2020	2019	2018	2017
Taxis – Sydney	-1%	-2%	-8%	-3%	-1%	-6%
Taxis – Other urban	+6%	+4%	-14%	-3%	+2%	-13%
Taxis – Rest of NSW	+%	+9%	-8%	+4%	-5%	+2%
Rideshare / Limo / Other hire vehicle – Sydney	+15%	+8%	+4%	+23%	+29%	+15%
Rideshare / Limo / Other hire vehicle – Other urban	+5%	+3%	-8%	+38%	+29%	+29%
Rideshare / Limo / Other hire vehicle – Rest of NSW	+28%	+18%	+12%	+18%	+21%	+11%

Base = Workplace at least sometimes pays for that transport [Sydney n=491-599; Other Urban n=61-99; Rest of NSW n=34-66]

[2] For simplicity, this question refers to "any rideshare, limousine or other hire vehicle" rather than differentiating.

Taken together, these results suggest that while taxis do remain the dominant form of point-to-point transport used by workplaces, there has been and continues to be an increasing acceptance of rideshare. However, since the impact of COVID-19 the scale of the move towards rideshare and away from taxi use in the workplace is much reduced.

Figure 52: Change over time in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33



Caution: Low base sizes for Other Urban and Rest of NSW samples.

F. Last-Trip Details

Type of point-to-point transport

67% of Sydney respondents had used point-to-point transport in the last 6 months (up from 55% in 2022 and 52% in 2020, and equal to 68% in 2019), along with 44% in other urban areas (up from 35% in 2022 and 2020, but still a little lower than 51% in 2019), and 41% in the rest of NSW (up from 29% in 2022 and 26% in 2020, and equal with the 40% seen in 2019).

While the absolute proportions of all respondents who had used point-to-point transport in the past six months has increased in the current survey compared to 2020 and 2022, the relative proportions using different services on their last trip has been more constant in this time. In Sydney 64% used rideshare for their last trip (62% in 2022) and 33% taxis (36% in 2022). In other urban areas 49% used rideshare most recently (56%) and 40% taxis (38%), while in the rest of NSW 64% had used taxis (58%) and just 34% had used rideshare (37%).

Figure 53: Usage of vehicle types for last trip (base = all respondents) Q36

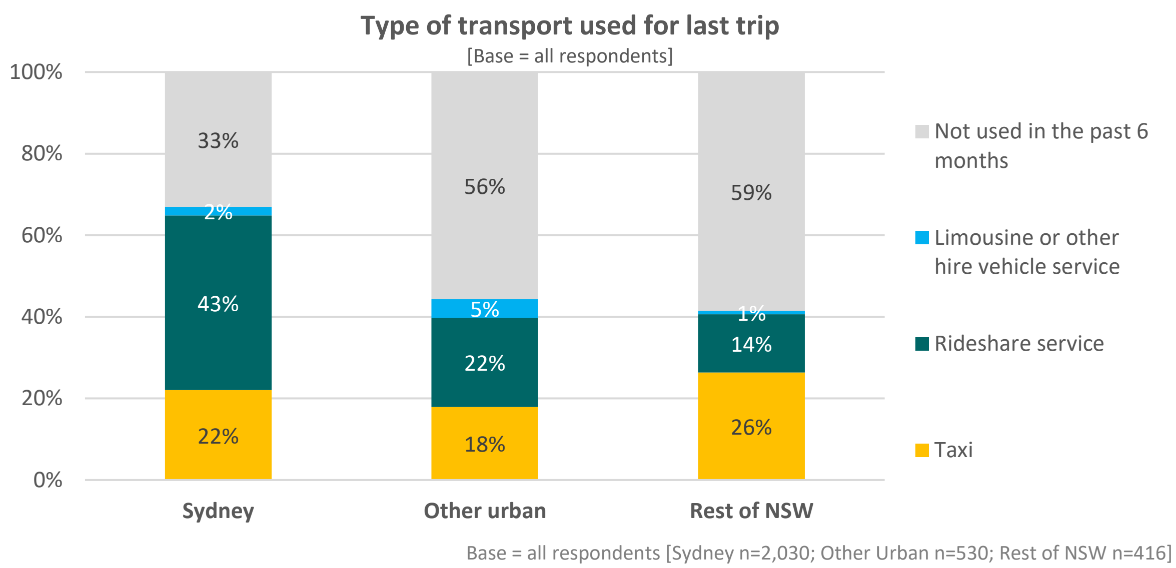
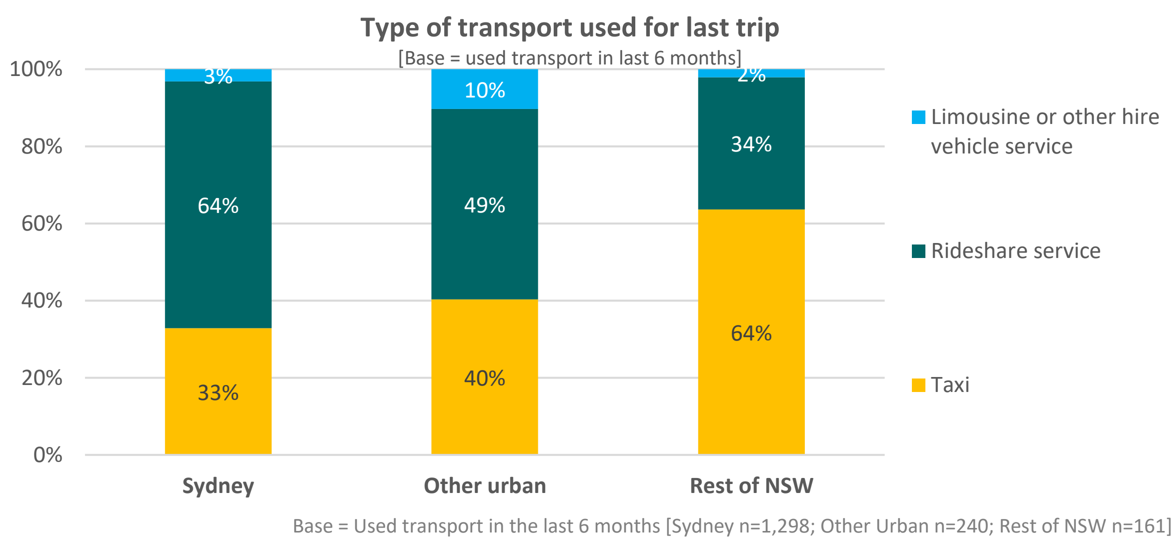
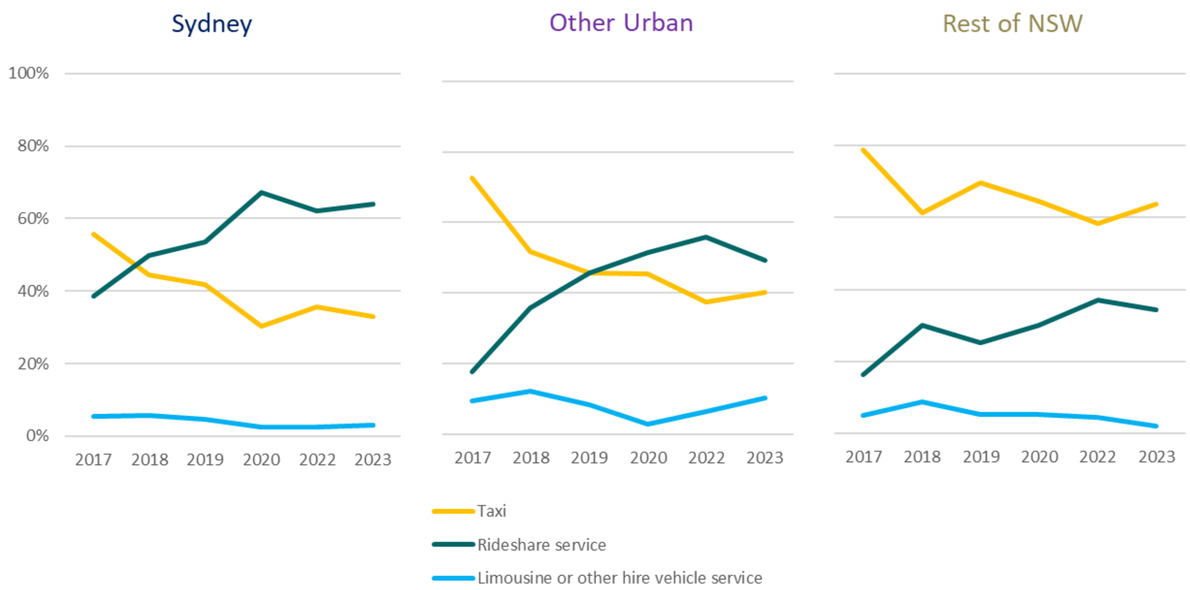


Figure 54: Usage of vehicle types for last trip (base = used transport in last 6 months) Q36



The tracking chart here uses the data in the second chart on the previous page, showing the proportion of last trips taken using different forms of transport only for respondents who had taken at least one trip in the last six months. These very clearly show how rideshare has effectively grown at the expense of taxi use, with limousine and other hire vehicles staying relatively steady across the six surveys while the rideshare and taxi tracking lines largely mirror each other.

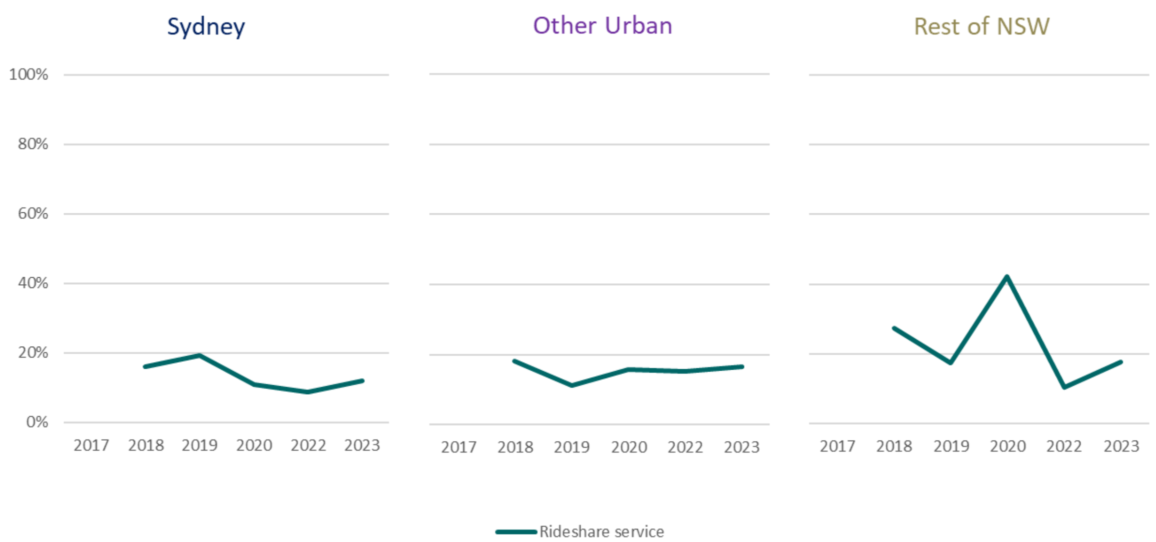
Figure 55: Changes in usage of vehicle types for last trip (base = used transport in last 6 months) QX



Pooled Rideshare

Pooled rideshare services involve multiple customers making a similar trip sharing the costs. Typically, and again in 2023, between 10% and 20% of respondents whose last trip was a rideshare in Sydney or other urban areas reported that a pooled rideshare service was used (though it remains possible that respondents do not fully understand the term 'pooled rideshare' and may be mis-reporting this. The greater variation in estimates of rideshare users in the rest of NSW who report their last rideshare to be pooled are likely mostly explained by lower sample sizes in that location.

Figure 56: Usage of 'pooled' rideshare facility for last trip (base = used rideshare for last trip) Q36a



Last Trip Characteristics

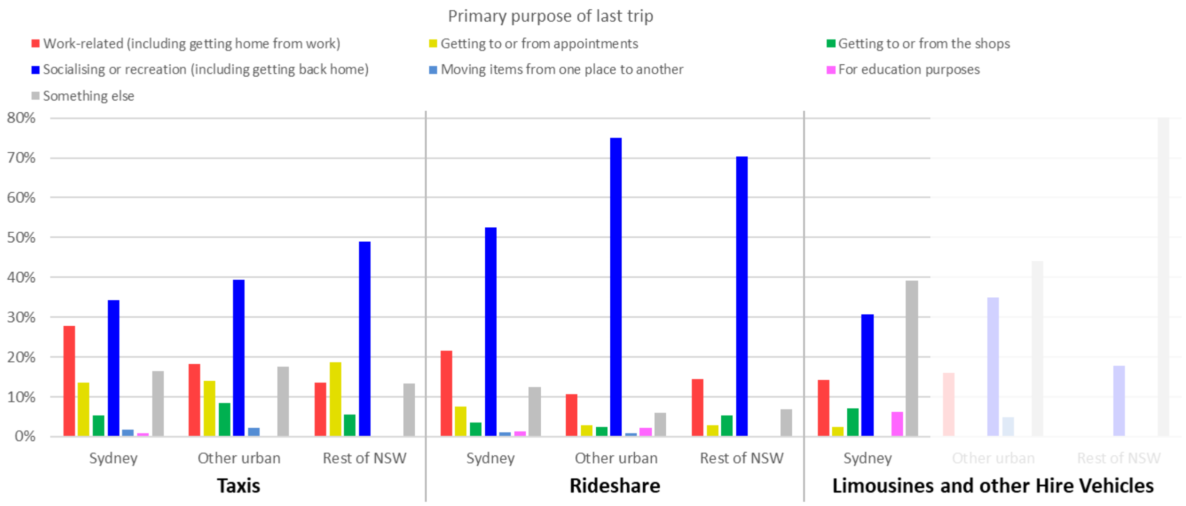
The next section looks at details of respondents' last trip in any type of point-to-point transport. Sample sizes for hire vehicles outside of Sydney are very small, and results for groups with sample of less than 30 are generally shown in a greyed out form in all tables and charts, and should be interpreted with great caution due to the small sample sizes.

Group	Sydney – Taxi	Sydney – Rideshare	Sydney – Limo / other HV	Other urban – Taxi	Other urban – Rideshare	Other urban – Limo / other HV	Rest of NSW – Taxi	Rest of NSW – Rideshare	Rest of NSW – Limo / other HV
2017 Sample	719	499	71	151	37	20*	126	26*	8*
2018 Sample	647	731	81	141	95	35	109	46	16*
2019 Sample	596	763	65	121	120	25*	121	41	9*
2020 Sample	325	715	26*	81	76	7*	69	22*	4*
2022 Sample	415	657	29*	69	95	16*	77	32	6*
2023 Sample	460	791	47	96	121	23*	109	48	4*

Purpose

Despite the lower volume of point-to-point transport usage in 2020 and 2022, the reasons for using point-to-point transport remained fairly consistent, and this remains the case in 2023. Socialising remains the dominant purpose for trips generally, and especially for rideshare. Socialising is also the main purpose for taxis, but to a lesser extent in all areas with work and transport to appointments more common for taxi users.

Figure 57: Last trip – Primary purpose C[Q39]



	Taxis			Rideshare			Limousines or other hire vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	460	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Work-related (inc getting home from work)	**28%**	**18%**	**14%**	**22%**	**11%**	**14%**	**14%**	16%	0%
Getting to or from **appointments**	14%	14%	**19%**	7%	3%	3%	2%	0%	0%
Getting to or from the **shops**	5%	8%	6%	4%	2%	5%	7%	0%	0%
Socialising or recreation (inc getting back home)	**34%**	**39%**	**49%**	**53%**	**75%**	**70%**	**31%**	**35%**	**18%**
Moving items from one place to another	2%	2%	0%	1%	1%	0%	0%	5%	0%
For **education** purposes	1%	0%	0%	1%	2%	0%	6%	0%	0%
Something else	**17%**	**18%**	13%	**12%**	**6%**	**7%**	**39%**	**44%**	**82%**

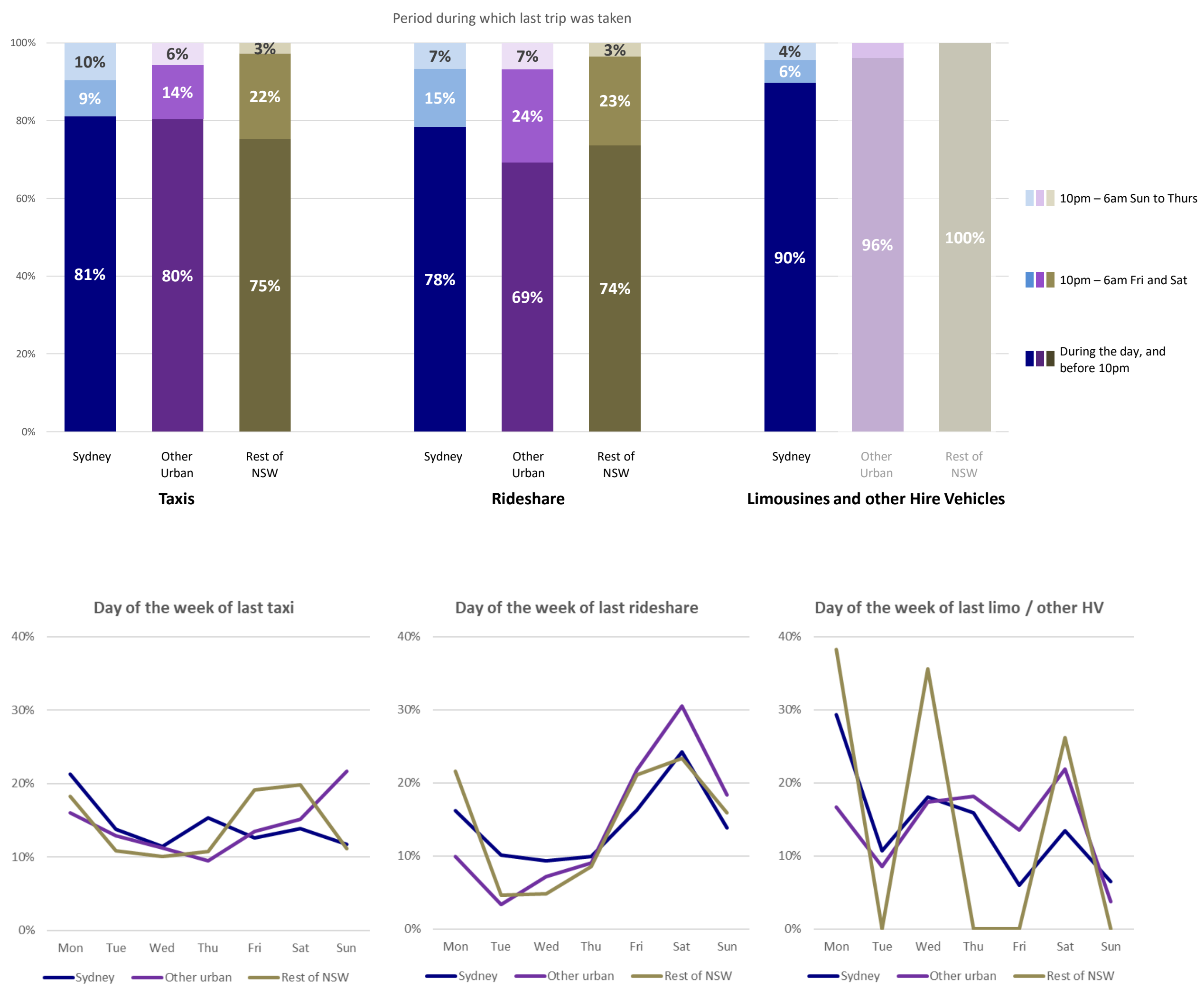
Bold figures = Top 3 responses.
Note small base sizes in some cases.

Time

Consistent with previous surveys, a majority of last trips reported on were during the day or before 10pm. Outside of Sydney, last rideshare use is somewhat more likely after 10pm, but not as much as has been seen in previous surveys.

Overall, rideshare trips generally show a more substantial peak on Fridays and Saturdays as compared to taxis, which are more evenly distributed through the week including on the weekends. This pattern – which remains apparent in 2023 – was seen across the COVID-affected surveys, suggesting the nature of use of taxis and rideshare remained consistent with previous years in that time, just with lower overall volumes. This different distribution, alongside the different ways taxis and rideshare are obtained, suggests that they are used in quite different ways by parts of their user bases.

Figure 58: Last trip – Period and day commenced Q38



Base = Used transport type within the last 6 months [Sydney n=183-1034; Other Urban n=44-168; Rest of NSW n=18-138]

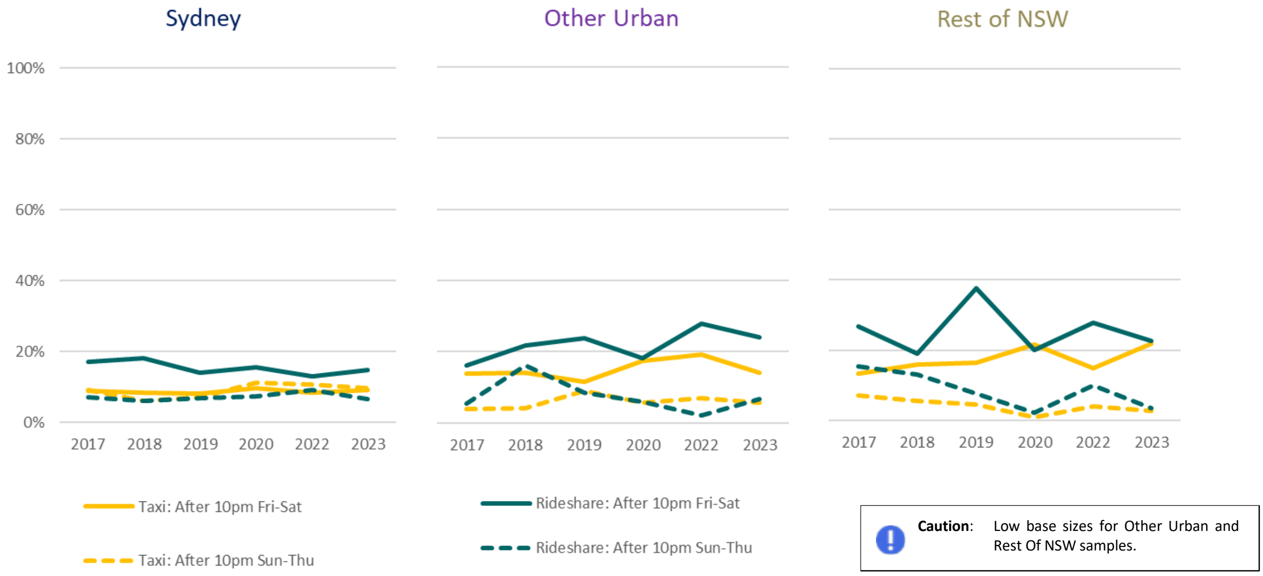
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

***Note**: This question was slightly modified from 2017 to 2018. In 2017 the response table showed up to midnight for each day, and then midnight-6am as part of the following day. The data suggested that some respondents were mis-classifying trips taken after midnight. In 2018 a separate category of 'after midnight' was added to each day, and the following day started with 'early morning – midday'. The improved response scale has given a more natural looking distribution.*

The tracking chart looking at the proportion of last trips that are after 10pm on Friday or Saturday night shows clearly the consistently higher proportion of rideshare trips in that timeslot. The tracking chart does suggest that proportional use of rideshare after 10pm on Friday and Saturday nights is slowly becoming less common in Sydney, but more common in other urban areas.

The rest of NSW samples here are very small, and so results should be interpreted with caution.

Figure 59: Last trip – Change in proportion of Last Trips after 10pm Q38



Note: Due to changes in the way this question was asked in 2018, some care should be taken comparing the post-2018 results to 2017.

Pick-up and Drop-off Location

The biggest impact on pick up and drop off locations during COVID was the reduced prevalence of airport trips (for taxis especially), but beyond that the pattern of locations was quite similar to previous surveys. Airport use has now returned to similar levels to 2019, while private homes remain the most commonly reported pick up point for a last trip. A consistent pattern observed is that rideshare services are equally likely to pick up or drop off at a private home, whereas taxis are more likely to drop off and limousines and other hire vehicles are more likely to pick up from private homes.

Figure 60: Last trip – pick up locations Q37

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

Sydney Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*460*	*460*	*791*	*791*	*47*	*47*
A private **home** or apartment	**27%**	**51%**	**48%**	**43%**	**51%**	**32%**
A **workplace** or office	**13%**	**11%**	**10%**	8%	3%	0%
A **shop** or shopping centre	4%	4%	3%	4%	3%	3%
A **pub, club** or other similar type of location	7%	4%	**12%**	**10%**	3%	0%
In a **CBD**, town centre or other busy area	**13%**	4%	8%	6%	2%	4%
At an **event**	4%	4%	4%	8%	5%	10%
At an **airport**	**22%**	**12%**	9%	**15%**	**22%**	**35%**
At a **train station** or other transport connection	6%	3%	5%	3%	**6%**	**14%**
Hospital or **medical** facility	2%	4%	0%	1%	0%	0%
Somewhere else	1%	2%	1%	2%	6%	2%

Other urban Last trip – Pick up / Drop off locations	Taxi		Rideshare		Limousines or other hire vehicle services	
	Pick up	*Drop off*	*Pick up*	*Drop off*	*Pick up*	*Drop off*
Sample size (Excludes can't recall):	*96*	*96*	*121*	*121*	*23*	*23*
A private **home** or apartment	**34%**	**49%**	**50%**	**46%**	**70%**	25%
A **workplace** or office	12%	**9%**	5%	2%	0%	0%
A **shop** or shopping centre	6%	3%	1%	3%	0%	0%
A **pub, club** or other similar type of location	**14%**	8%	**24%**	**24%**	5%	0%
In a **CBD**, town centre or other busy area	7%	3%	6%	7%	0%	0%
At an **event**	6%	6%	3%	**9%**	0%	0%
At an **airport**	2%	6%	1%	4%	21%	52%
At a **train station** or other transport connection	**15%**	**12%**	**6%**	3%	0%	5%
Hospital or **medical** facility	4%	3%	2%	0%	0%	0%
Somewhere else	0%	1%	2%	2%	4%	18%

Base: Used the type of transport in the last 6 months

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories. Note small base sizes in some cases.

Rest of NSW Last trip – Pick up / Drop off locations	**Taxi**		**Rideshare**		**Limousines or other hire vehicle services**	
	Pick up	***Drop off***	***Pick up***	***Drop off***	***Pick up***	***Drop off***
Sample size (Excludes can't recall):	*109*	*109*	*48*	*48*	*4*	*4*
A private **home** or apartment	**43%**	**49%**	**32%**	**48%**	74%	26%
A **workplace** or office	**7%**	**7%**	7%	**11%**	0%	0%
A **shop** or shopping centre	4%	4%	3%	3%	0%	0%
A **pub, club** or other similar type of location	**21%**	**11%**	**26%**	6%	0%	0%
In a **CBD**, town centre or other busy area	5%	7%	7%	1%	0%	0%
At an **event**	0%	5%	**10%**	**14%**	26%	0%
At an **airport**	5%	2%	**10%**	8%	0%	74%
At a **train station** or other transport connection	6%	5%	3%	5%	0%	0%
Hospital or **medical** facility	5%	6%	0%	0%	0%	0%
Somewhere else	4%	4%	1%	4%	0%	0%

Base: Used the type of transport in the last 6 months

Bold figures = Top 3 responses. Most "something else" responses were back-coded into existing categories.
Note small base sizes in some cases.

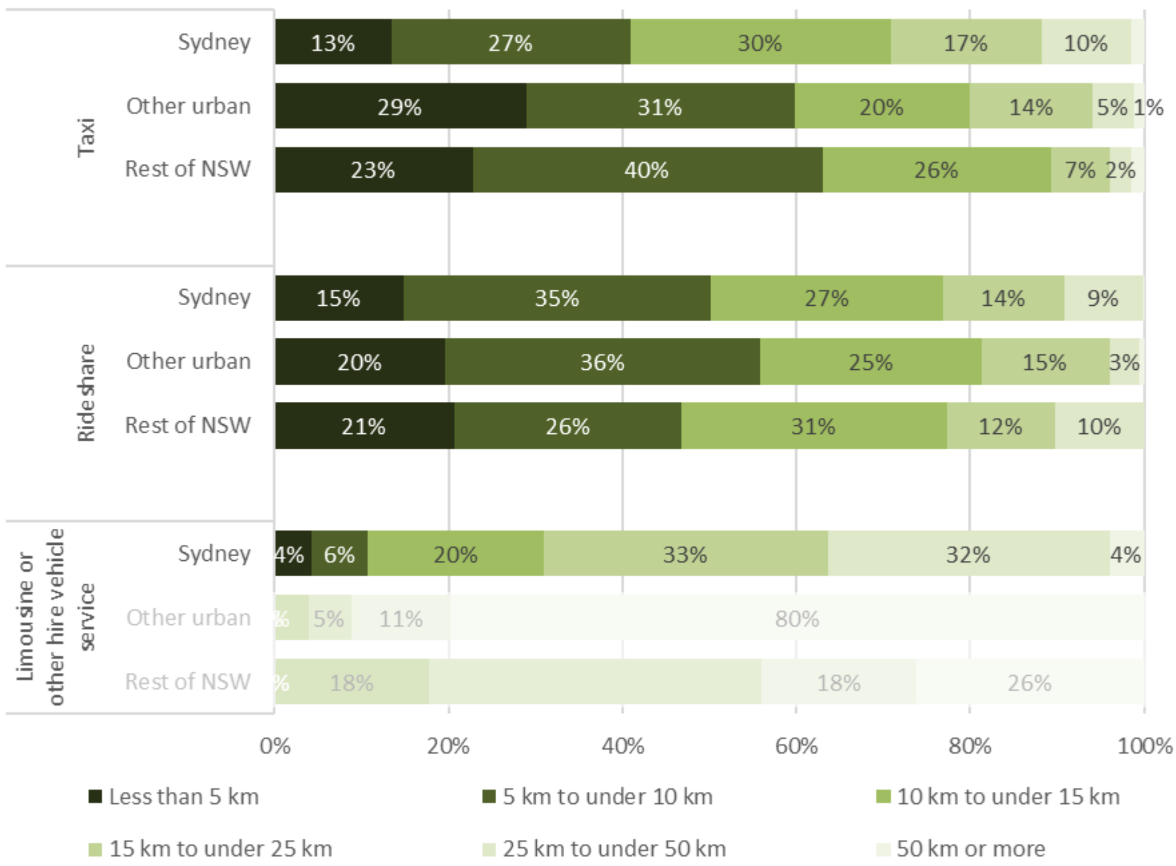
Length

Estimated length of taxi trips tend to be shortest from the Rest of NSW respondents, and longest in Sydney, likely reflecting the relative geographic size of centres. In the 2020 survey this effect not visible to the same extent as usual, and in 2023 is also less apparent.

In most surveys there has been less variation in length of rideshare trips across locations than there was in taxi trips, and rideshare trips tended to be somewhat shorter than taxis. Estimated last rideshare trips are very similar in length to taxis in 2023, and more similar across locations (with this mostly reflecting the lower variation in taxis).

Perhaps not surprisingly, trips in limousines or other hire vehicles tend to be somewhat longer.

Figure 61: Last trip – Estimated length Q55



Base = Used transport type within the last 6 months [Sydney n=183-1034; Other Urban n=44-168; Rest of NSW n=18-138]

Reason for Choice of Vehicle Type

Since the 2018 survey, reasons for choosing the particular type of transport service are allowed more detail, collecting not only the *main* reason for the choice, but also any other reasons (‘*total*’). In 2023, as previously seen, perceptions of convenience are still amongst the most important reason for choice across all types of point-to-point transport. Being more convenient than driving is a common reason for choosing point-to-point transport in all locations, and for all types of choice made.

Waiting times are generally more important than travel times, and this is especially the case for choosing rideshare. Total travel time is a slightly more important consideration in Sydney.

Outside of Sydney not having access to any other transport options is a bigger consideration when choosing taxis, while for rideshare the other common consideration is it being cheaper than alternatives (both patterns that have been seen in previous years).

Virtually no respondents in 2023 indicated that being a good option in COVID was a consideration in their choice of point-to-point transport.

Figure 62: Reasons for using a particular type of transport for the most recent trip Q40

Reasons for use instead of other transport options or driving yourself		Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
		Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
n=	*Main*	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
	Total	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Quicker to get / shorter waiting time	Main	20%	19%	14%	23%	13%	28%	8%	0%	0%
	Total	33%	27%	18%	39%	33%	42%	12%	8%	18%
Quicker or more direct travel time	Main	17%	12%	2%	12%	11%	0%	13%	13%	0%
	Total	28%	27%	9%	25%	16%	14%	20%	18%	0%
More convenient than driving	Main	21%	25%	32%	23%	36%	33%	17%	49%	18%
	Total	33%	30%	34%	36%	49%	35%	35%	75%	18%
More convenient than other paid transport options I could have used	Main	10%	9%	7%	10%	8%	4%	6%	14%	0%
	Total	20%	13%	10%	24%	22%	17%	22%	44%	26%
Cheaper than alternatives	Main	3%	2%	1%	10%	11%	16%	5%	5%	26%
	Total	5%	7%	1%	20%	23%	35%	12%	17%	26%
More reliable than alternatives	Main	4%	3%	5%	2%	4%	3%	15%	4%	0%
	Total	11%	8%	8%	12%	10%	16%	43%	28%	18%
Makes different types of vehicle (like a van, ute or luxury car) available	Main	1%	4%	1%	1%	0%	0%	10%	5%	38%
	Total	3%	5%	2%	4%	0%	2%	16%	25%	64%
I didn’t have access to any other transport options	Main	13%	18%	23%	9%	7%	9%	0%	4%	0%
	Total	22%	23%	32%	15%	11%	9%	6%	4%	0%
It’s what I am most comfortable or familiar using	Main	5%	3%	3%	4%	2%	1%	6%	4%	18%
	Total	13%	6%	16%	13%	12%	8%	12%	26%	18%
It was a good option to use during COVID conditions	Main	1%	0%	1%	1%	0%	0%	3%	0%	0%
	Total	3%	4%	4%	2%	0%	3%	5%	5%	0%
Other	Main	6%	6%	12%	4%	7%	5%	17%	4%	0%
	Total	9%	9%	14%	7%	7%	7%	24%	4%	0%

Base = Used transport in the last 6 months

Obtaining a Vehicle

The bulk of taxis in all locations (66%-84%) are obtained through a combination of rank and hail, and by phoning taxi companies. This total proportion has been slowly declining since the 75%-91% that was seen in 2019, with the cumulative use of apps and internet bookings slowly increasing to make up around a third of last taxis caught in Sydney and around a quarter in other urban areas.

In Sydney rank and hail still accounted for nearly half of all most recent taxi trips (48%) – unchanged from 2022, but slightly down from 54% in 2019. Outside of Sydney hailing typically accounts for a very small proportion only (3%-6% in 2023), while phoning a taxi company (37%-69%) is much more common. Internet or app booking is up to 23% in Sydney, though is less used in other urban areas and the rest of NSW.

Even outside of Sydney, rideshare is almost exclusively obtained by smartphone apps or by an internet booking, with the apps accounting for the great bulk.

The relatively small number of last trips that were by limousines and other hire vehicles are mostly obtained by phone or internet bookings, or by contacting a driver directly. Sample sizes are too small for this type of transport each year to draw any strong conclusions, but a similar pattern is visible each year which suggests that it is a stable pattern.

Figure 63: Last trip – Method of obtaining vehicle Q41

Last trip – Method of obtaining vehicle	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
At a **taxi rank**	**29%**	**33%**	12%						
Hailed/waved down on the street	19%	6%	3%						
Rank + hail	**48%**	**40%**	15%						
Phoned a taxi company	19%	**37%**	**69%**						
Rank + hail + phone taxi company	**66%**	**77%**	**84%**						
By calling a **phone number**				1%	5%	18%	22%	44%	18%
By **internet booking**	16%	10%	9%	11%	21%	7%	**25%**	30%	**56%**
Contacted a **driver directly**	5%	2%	1%	2%	0%	1%	**31%**	9%	**26%**
Had a **regular booking**	2%	3%	1%	2%	0%	0%	0%	0%	0%
Used a **smartphone application** (app)	7%	4%	2%	**82%**	**72%**	**72%**	6%	0%	0%
Some **other way**	1%	1%	2%	1%	0%	0%	6%	5%	0%
Not sure, someone else organised it	3%	2%	1%	1%	1%	2%	11%	12%	0%

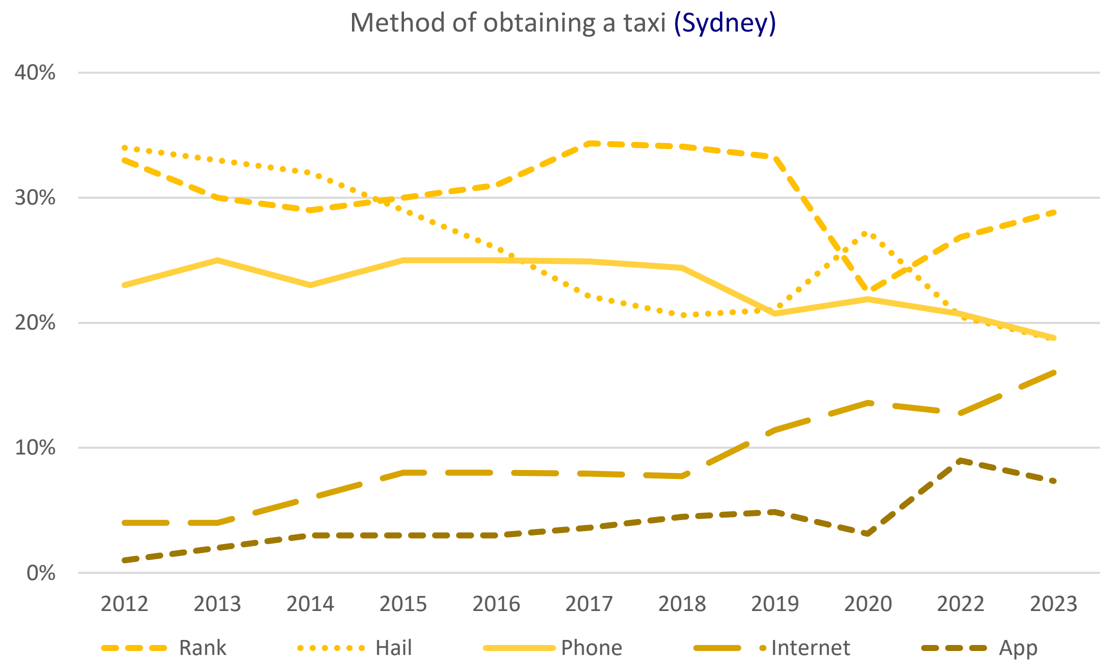
NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

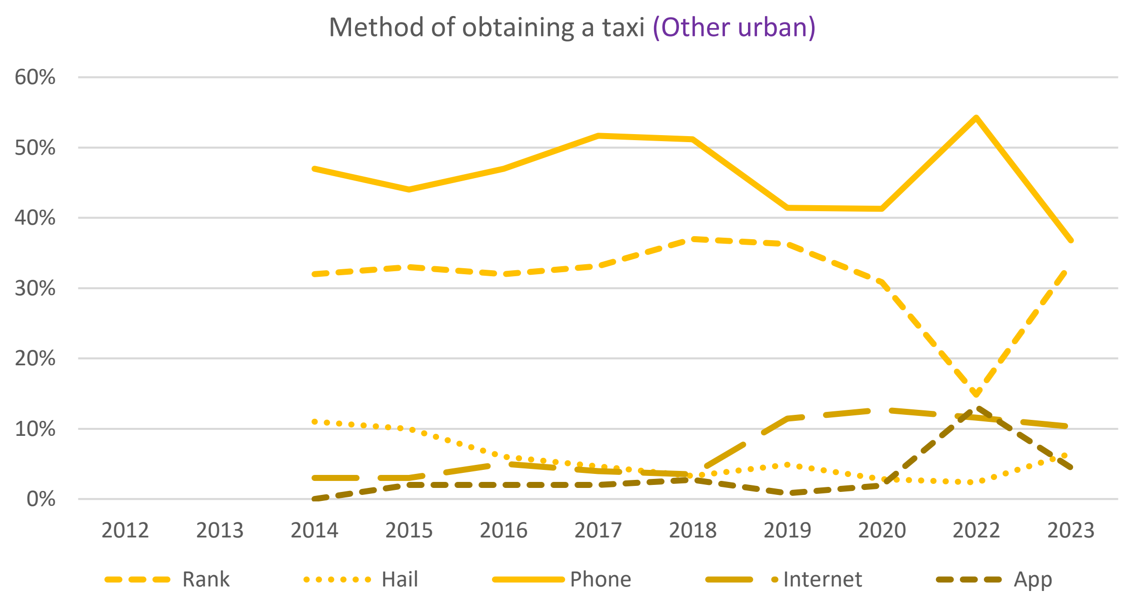
Note small base sizes in some cases.

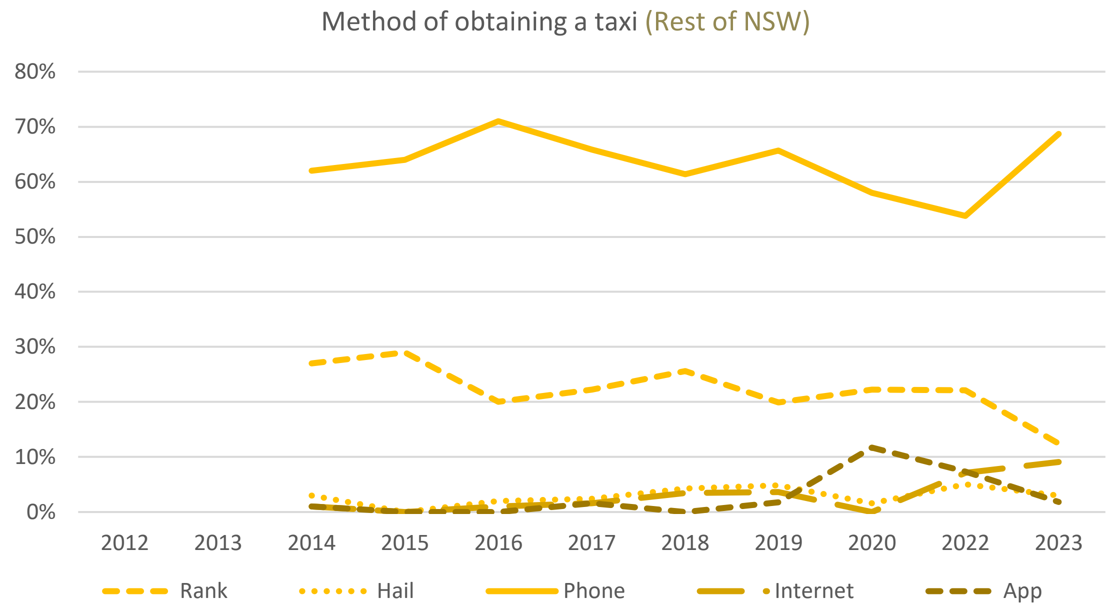
The most substantive change over time in how taxis are obtained has been the slow but steady increase in taxis obtained via internet bookings and via an app. In Sydney and other urban areas this combined approach now accounts for nearly a quarter of last taxi trips. This change seems to be primarily reducing reliance on hailing one in the street, particularly with the reciprocity seen in the inverted spikes in the two methods in 2020.

Outside of Sydney, most taxis are usually obtained by phone or from a rank, with hailing much less common. Use of ranks in other urban areas fell sharply in the 2020 and 2022 surveys, but appears to have picked up again in 2023, with an equivalent reduction in phone and app bookings. Whether this is a return to pre-COVID use of ranks in other urban areas or merely an aberration will require further monitoring.

Figure 64: Last trip – Changes in method of obtaining vehicle Q41







In 2020 and again in 2022 there was a somewhat greater reliance on ASAP / next available bookings rather than cars pre-booked for a particular time, and this was seen across both taxis and rideshare. 57% of booked taxis were ASAP bookings in Sydney in 2023, down from 61%-62% seen in 2020 and 2022, and similar to 55% in 2019. The equivalent figure for rideshare was 90%, in the middle of the range of 88% to 92% seen since 2019.

Trends outside of Sydney are less consistent, but for both taxis and rideshare the figures for other urban areas are not dramatically different to 2019, suggesting that the balance of bookings is not substantially changing.

As usual, the majority of limousines and other hire vehicles were booked for a particular time, even amongst the small sample sizes available in 2023.

Figure 65: Last trip – Type of booking Q48

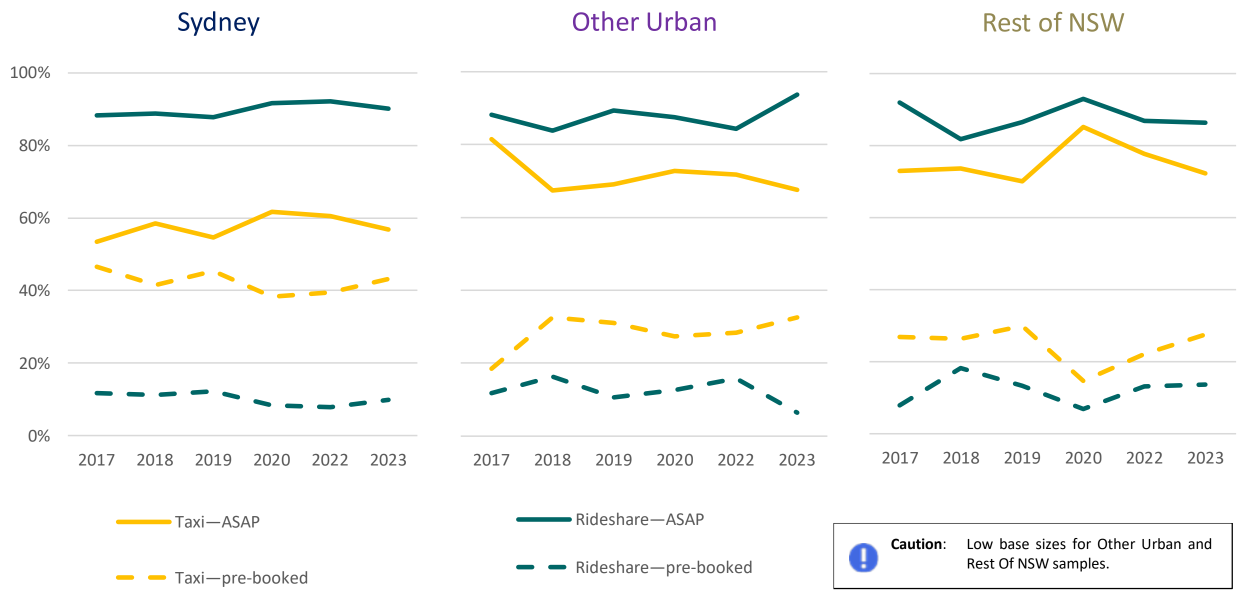
NOTE: Reduced base sizes / small bases sizes for Other Urban and Rest of NSW.

Last trip – Method of obtaining vehicle	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Booked the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*211*	*52*	*89*	*760*	*119*	*47*	*39*	*19*	*4*
As soon as possible / the next available	**57%**	**68%**	**72%**	**90%**	**94%**	**86%**	7%	0%	0%
For a particular time	**43%**	**32%**	**28%**	10%	6%	14%	**93%**	100%	100%

In Sydney both taxis and rideshare bookings became slightly more likely to be ASAP bookings during COVID, but have since returned to more typical pre-COVID levels in 2023. In other urban areas and the rest of NSW there have been more fluctuations, and there is no clear long-term trend. It is likely that even for other urban areas, the higher level of fluctuations seen from year to year may be more sample size related.

Figure 66: Last trip – Changes in type of booking Q48

NOTE: Reduced base sizes / small bases sizes for Other Urban and Rest of NSW.



Awareness of service provider

Awareness of service provider names is not significantly changing. The great majority of rideshare users (around 4-in-5) report that they know the name of the service they used, while far fewer users of taxis do, especially those who are using rank and hail taxis.

Typically around 2-in-5 users of booked taxis think they are aware of the name of the taxi company they used, while typically less than 1-in-5 users of rank and hail taxis think they do.

All of these broad patterns were seen again in 2023.

Figure 67: Last trip – Awareness of service provider Q42/Q45

Last Trip—Awareness of Service Provider	Taxi					
Base: *Used the type of transport in the last 6 months AND method of obtaining last vehicle*	Sydney	Sydney	Other urban	Other urban	Rest of NSW	Rest of NSW
	Rank & Hail	Booked	Rank & Hail	Booked	Rank & Hail	Booked
Sample size	*224*	*191*	*37*	*50*	*16*	*87*
Aware	12%	38%	25%	37%	21%	48%
"Think so"	4%	3%	0%	5%	0%	5%
Not aware	84%	59%	75%	58%	79%	47%

	Rideshare Services			Limousines or Other Hire Vehicles		
	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
	Booked	Booked	Booked	Booked	Booked	Booked
Sample size	*747*	*119*	*46*	*26*	*17*	*3*
Aware	79%	80%	66%	23%	28%	0%
"Think so"	2%	2%	0%	0%	5%	0%
Not aware	19%	18%	34%	77%	67%	100%

NOTE: Small bases sizes for Other Urban and Rest of NSW. Interpret grey numbers with caution.

Bold figures = 50%+ of category. Note small base sizes in some cases.

Consideration of booking when using rank and hail

13% of respondents in Sydney whose most recent trip was a rank or hail taxi did at least consider calling or booking a vehicle too – slightly lower than the 18%-20% seen in previous surveys (since 2019 when this question was first asked). Outside of Sydney, due to the small sample size, these results should be considered as purely indicative, but typically amongst the small number of non-Sydney users a higher proportion appear to consider making a booking.

Figure 68: Rank and Hail taxi users who considered calling or booking transport instead Q43

	Sydney	Other Urban	Rest of NSW
Proportion of people whose last trip was by taxi obtained from Rank or Hail who at least considered calling or booking instead:	13%	17%	60%
Sample size	*224*	*37*	*16*

Base = Used Rank or Hail taxi for the last trip

Clearly the most common reason for not calling or booking a vehicle after considering doing so is having immediate access to a taxi by rank or hail. Beyond this immediate availability, the next most common reason is not wanting to pay a booking fee.

The general relative proportions of these reasons are consistent with what has been previously seen, even with the small samples involved.

Figure 69: Reasons for not calling or booking transport after considering that option Q44

NOTE: Small bases sizes. Interpret grey numbers with caution

Reasons for not calling or booking after considering that option	Sydney	Other Urban	Rest of NSW
There was a taxi immediately available at the rank/to be hailed on the street	58%	30%	28%
You did not want to pay a booking fee	20%	31%	14%
You didn't think a booked taxi would arrive any faster	13%	39%	45%
You wanted to be anonymous	0%	0%	0%
You didn't have access to a phone or the internet to make a booking	4%	0%	0%
You didn't know how to book a taxi or other vehicle	5%	0%	0%
Something else	14%	0%	14%
Sample size	*27*	*6*	*8*

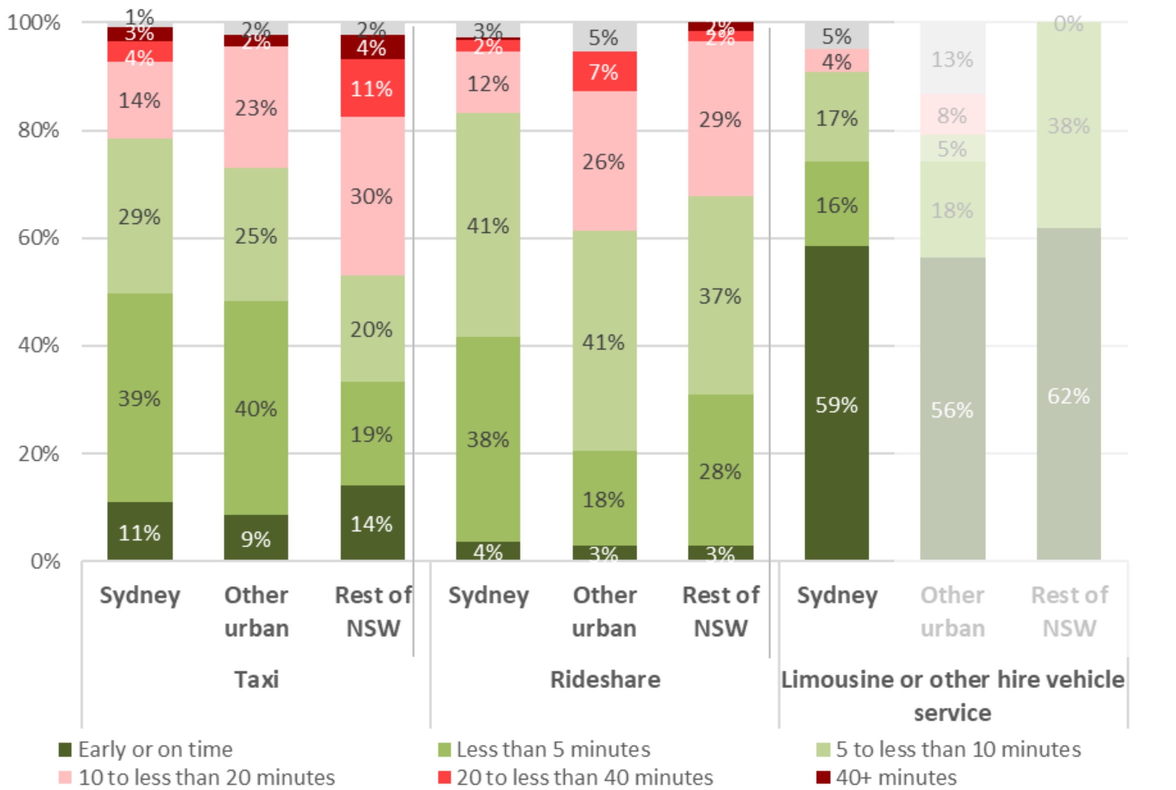
Base = Used Rank or Hail taxi for the last trip AND considered calling or booking transport

Waiting Time

Despite waiting times and availability being considered strong advantages of rideshare services over taxis in general, if anything, overall taxis were once again somewhat more likely than rideshare to be obtained within 5 minutes. However, as previously seen, the detailed breakdowns (following pages) show the strong performance of taxis overall is driven by short rank and hail waiting times. In the ASAP booking category – which is most directly equivalent to the typical rideshare process of getting a vehicle – taxi waiting times are considerably longer in Sydney (though not in other urban areas).

Figure 70: Overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

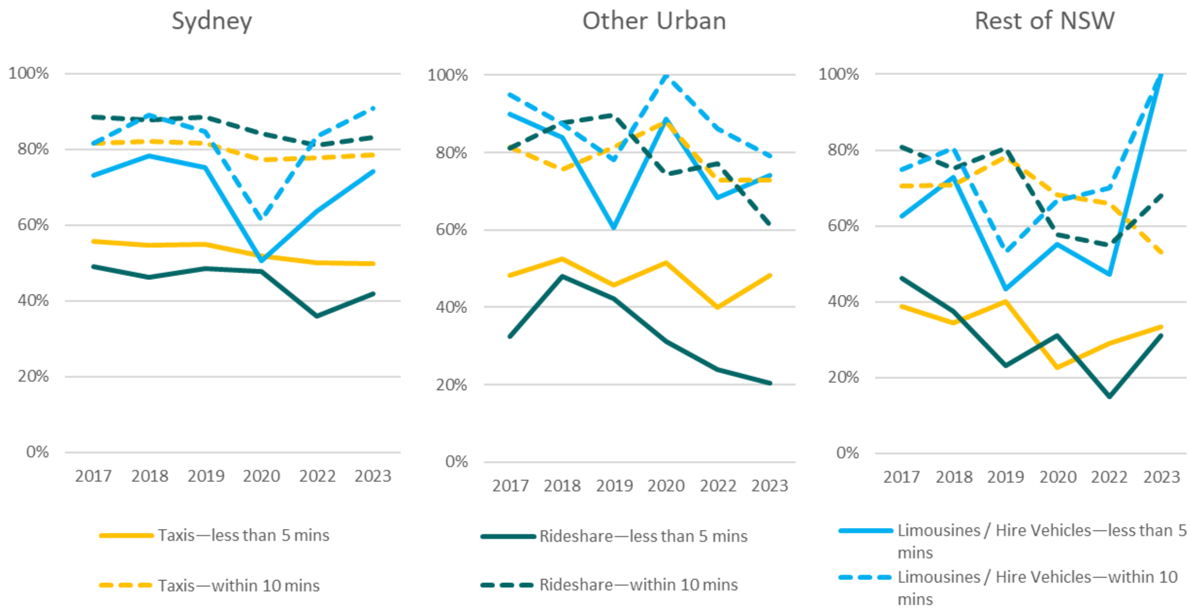
Last trip – Overall waiting time	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Early or on time (pre-booking only)	11%	9%	14%	4%	3%	3%	59%	56%	62%
Less than 5 minutes	39%	40%	19%	38%	18%	28%	16%	18%	38%
Within 5 minutes	**50%**	**48%**	**33%**	**42%**	**20%**	**31%**	**74%**	**74%**	**100%**
5 to less than 10 minutes	29%	25%	20%	41%	41%	37%	17%	5%	0%
Within 10 minutes	**79%**	**73%**	**53%**	**83%**	**61%**	**68%**	**91%**	**79%**	**100%**
10 to less than 20 minutes	14%	23%	30%	12%	26%	29%	4%	8%	0%
20 to less than 40 minutes	4%	0%	11%	2%	7%	2%	0%	0%	0%
40 or more minutes	3%	2%	4%	0%	0%	2%	0%	0%	0%
Can't recall	1%	2%	2%	3%	5%	0%	5%	13%	0%



Base = Last trip within last 6 months

The tracking charts suggest that waiting times for point-to-point transport services have been getting slightly longer over time, especially for rideshare (and especially in other urban areas). Overall taxi waiting times are also trending longer, but changing to a lesser extent than rideshare.

Figure 71: Changes in overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Detailed waiting times by time of day

While the majority of Sydney respondents' last trip was during the day and before 10pm, there were sufficient sample sizes of trips after 10pm on Friday-Saturday or Sunday-Thursday to indicatively compare waiting times. This suggests that taxi waiting times on Friday and Saturday nights may be better than for rideshare, but again this likely reflects the impact of short rank and hail waits.

Figure 72: Overall waiting times for taxis and rideshare, by region Q46/47/50/51/52

Last trip – Overall waiting time in Sydney, by time of week	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**
Sample size	*362*	*41*	*42*	*681*	*129*	*57*
Early or on time (pre-booking only)	13%	3%	7%	5%	1%	6%
Less than 5 minutes	37%	62%	38%	39%	31%	38%
Within 5 minutes	**50%**	**64%**	**45%**	**43%**	**32%**	**43%**
5 to less than 10 minutes	30%	18%	19%	40%	51%	34%
Within 10 minutes	**80%**	**82%**	**64%**	**84%**	**83%**	**77%**
10 to less than 20 minutes	14%	10%	19%	11%	13%	17%
20 to less than 40 minutes	4%	3%	7%	2%	1%	4%
40 or more minutes	2%	0%	10%	0%	0%	0%
Can't recall	1%	5%	0%	3%	4%	2%

Sample sizes were too small in the other areas to look at waiting times other than for those whose last trip was during the day and before 10pm. Reported daytime waiting times in these areas are similar to or slightly longer than in Sydney.

Last trip – Overall waiting time other urban areas, by time of week	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**
Sample size	*76*	*13*	*5*	*80*	*27*	*7*
Early or on time (pre-booking only)	12%	0%	0%	4%	0%	0%
Less than 5 minutes	36%	46%	60%	18%	16%	43%
Within 5 minutes	**47%**	**46%**	**60%**	**22%**	**16%**	**43%**
5 to less than 10 minutes	27%	23%	40%	41%	39%	43%
Within 10 minutes	**74%**	**69%**	**100%**	**63%**	**55%**	**86%**
10 to less than 20 minutes	21%	31%	0%	24%	35%	0%
20 to less than 40 minutes	0%	0%	0%	8%	3%	14%
40 or more minutes	3%	0%	0%	0%	0%	0%
Can't recall	3%	0%	0%	5%	6%	0%

Last trip – Overall waiting time other NSW, by time of week	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**	**Day, <10pm**	**Night, Fri-Sat**	**Night, Sun-Thu**
Sample size	*82*	*24*	*3*	*43*	*13*	*2*
Early or on time (pre-booking only)	20%	0%	0%	5%	0%	0%
Less than 5 minutes	24%	11%	0%	38%	0%	0%
Within 5 minutes	**44%**	**11%**	**0%**	**43%**	**0%**	**0%**
5 to less than 10 minutes	21%	32%	0%	35%	44%	50%
Within 10 minutes	**64%**	**42%**	**0%**	**78%**	**44%**	**50%**
10 to less than 20 minutes	21%	37%	33%	19%	44%	50%
20 to less than 40 minutes	8%	21%	0%	3%	0%	0%
40 or more minutes	6%	0%	0%	0%	11%	0%
Can't recall	1%	0%	67%	0%	0%	0%

Detailed waiting times by method of obtaining vehicles

While there continues to be little overall difference in reported waiting times for taxis and rideshare, for the directly comparable ASAP bookings category, rideshare users do again report considerably shorter wait times than taxis. This is very apparent in Sydney (and for the small number of respondents in the rest of NSW), but much less so in other urban areas.

Figure 73: Detailed waiting times by methods of obtaining a vehicle Q46/47/50/52

Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Rank									
Less than 5 minutes	69%	75%	52%						
5 to less than 10 minutes	20%	17%	38%						
10 to less than 20 minutes	10%	8%	10%						
20 to less than 40 minutes	1%	0%	0%						
More than 40 minutes	0%	0%	0%						
Can't recall	1%	0%	0%						
Sample	140	31	13						
Hail									
Less than 5 minutes	60%	66%	31%						
5 to less than 10 minutes	28%	20%	0%						
10 to less than 20 minutes	7%	15%	32%						
20 to less than 40 minutes	2%	0%	37%						
More than 40 minutes	2%	0%	0%						
Can't recall	1%	0%	0%						
Sample	84	6	3						
ASAP booking									
Less than 5 minutes	9%	14%	15%	41%	18%	31%	26%	0%	-
5 to less than 10 minutes	49%	35%	20%	44%	43%	36%	26%	0%	-
10 to less than 20 minutes	30%	43%	40%	11%	26%	29%	48%	0%	-
20 to less than 40 minutes	7%	0%	16%	2%	8%	2%	0%	0%	-
More than 40 minutes	4%	6%	4%	0%	0%	2%	0%	0%	-
Can't recall	1%	3%	4%	2%	6%	0%	0%	0%	-
Sample	117	35	62	683	111	41	3	0	0
Pre-booking									
It was early or on-time	49%	42%	60%	32%	42%	21%	75%	68%	62%
Less than 5 minutes	16%	16%	13%	23%	22%	15%	5%	17%	38%
5 to less than 10 minutes	16%	25%	7%	20%	0%	48%	19%	6%	0%
10 to less than 20 minutes	8%	17%	13%	17%	29%	15%	0%	5%	0%
20 to less than 40 minutes	6%	0%	0%	5%	7%	0%	0%	0%	0%
More than 40 minutes	5%	0%	8%	1%	0%	0%	0%	0%	0%
Can't recall	1%	0%	0%	3%	0%	0%	0%	5%	0%
Sample	104	21	28	93	9	6	36	19	4

Waiting time estimates

Waiting time estimates remain extremely common for ASAP booked rideshares, with less than 3% who were confident they were not given a waiting time estimate – consistent with previous years.

For ASAP taxis, providing waiting time estimates remains less widespread, though still common. 44%-69% of respondents with booked taxis recall getting a waiting time estimate in 2023, similar to the 2022 (53%-67%), 2020 (51%-58%) and 2019 (53%-61%) figures given the sample sizes involved.

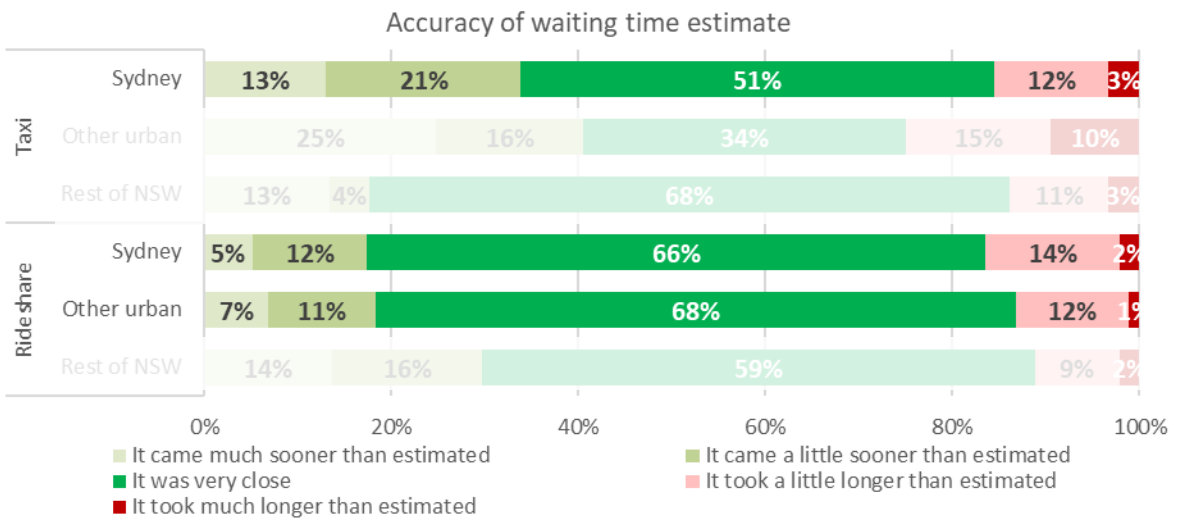
Figure 74: Last trip – Prevalence of being given a waiting time estimate for ASAP bookings Q49

Last trip – Given waiting time estimate	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months and made ASAP booking	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*117*	*35*	*62*	*683*	*111*	*41*	*3*	*0*	*0*
Yes	69%	65%	44%	94%	93%	90%	74%	-	0%
No	21%	7%	36%	3%	2%	0%	0%	-	0%
Can't recall	10%	28%	20%	3%	4%	10%	26%	-	0%

Waiting time estimates were mostly considered very close, or the vehicle actually arrived sooner than estimated. Only small proportions of those given an estimate by either taxis or rideshare services reported the vehicle being longer than estimated.

Sample sizes here are very small for comparison across transport types, or locations. However, in 2023 users of taxis who were given a waiting time were the most likely to report that the taxi arrived earlier than the estimate they had been given, a pattern that was also seen in 2022.

Figure 75: Last trip – Accuracy of waiting time estimate for ASAP bookings Q53



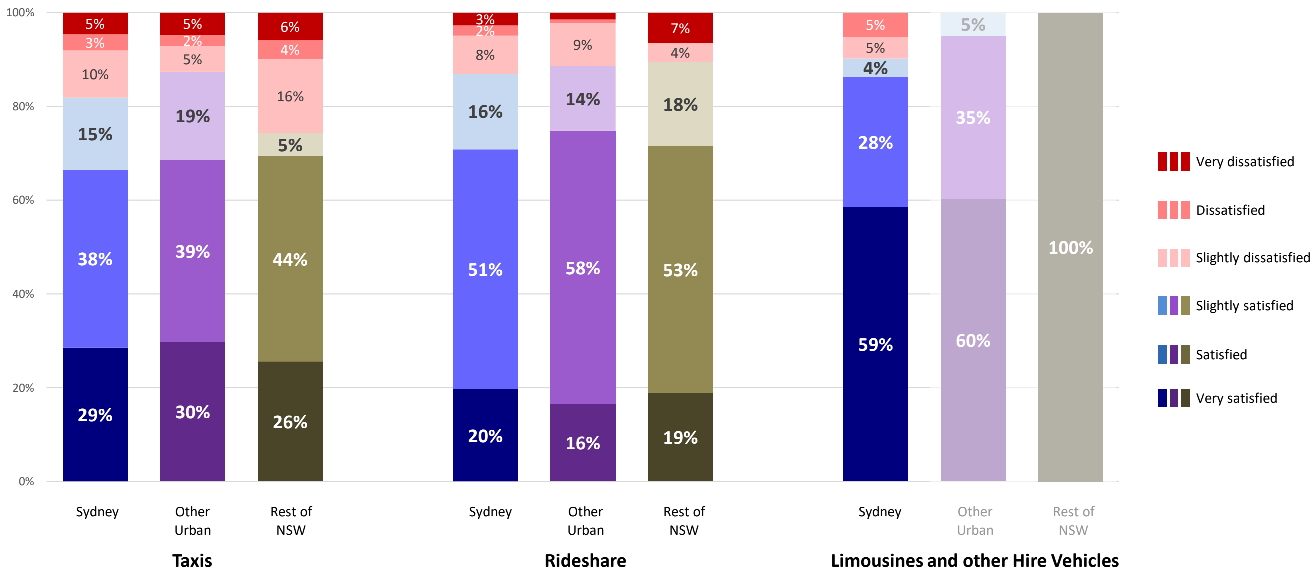
Base = Last trip within last 6 months by ASAP booking and given a waiting time estimate
[Sydney n=80-638; Other Urban n=23-102; Rest of NSW n=27-38]

Satisfaction with waiting times

Satisfaction with last trip waiting times remains stable and generally strong, with above 80% *at least slightly satisfied* across most locations and types of transport service (in 2023 it was only taxi waiting times in rest of NSW that dropped below the 80% satisfaction level at 74%).

- Satisfaction with rideshare waiting times was equal to or lower than for taxis in all locations in 2022, reversing the previously observed pattern of results, but in 2023 returned to be equal to or *higher* than taxis.
- For the most part, overall satisfaction with taxi and rideshare waiting times was quite consistent across locations in 2022 and 2023. In both years the proportion of taxi users who were 'very satisfied' was higher than for rideshare.

Figure 76: Last trip – Satisfaction with waiting time Q54



Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Very Satisfied	29%	30%	26%	20%	16%	19%	59%	60%	100%
Satisfied	38%	39%	44%	51%	58%	53%	28%	35%	0%
Slightly satisfied	15%	19%	5%	16%	14%	18%	4%	5%	0%
Total satisfied	**82%**	**87%**	**74%**	**87%**	**89%**	**89%**	**90%**	**100%**	**100%**
Slightly dissatisfied	10%	5%	16%	8%	9%	4%	5%	0%	0%
Dissatisfied	3%	2%	4%	2%	1%	0%	5%	0%	0%
Very dissatisfied	5%	5%	6%	3%	1%	7%	0%	0%	0%
Total dissatisfied	**18%**	**13%**	**26%**	**13%**	**11%**	**11%**	**10%**	**0%**	**0%**

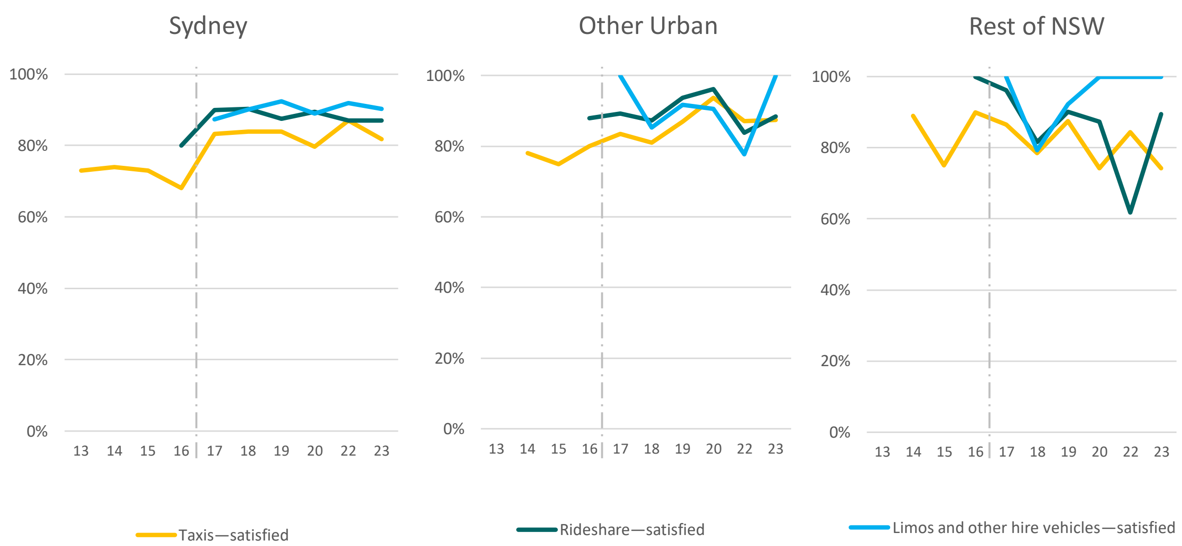
ORIMA

Tracking of waiting time satisfaction shows some variable patterns across transport type.

Satisfaction with rideshare waiting times dipped in all locations in 2022, but largely corrected in 2023. Multi-year trends for rideshare are fairly flat since 2017.

Satisfaction with taxi waiting times has been fairly steady in Sydney since the new survey was introduced in 2017, but has trended up in other urban areas and down in the rest of NSW.

Figure 77: Last trip – Changes in satisfaction with waiting time Q54



Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Fares

***Note**: In 2017 this question used the response categories shown below. However, while this encourages more responses by making it easy to answer, it gives less precise data for analysis. In 2018 an exact figure (estimate) was introduced. This resulted in a higher level of respondents saying they were unsure because someone else paid, or that they could not recall, but gives more detailed (and likely more reliable) data from the remaining respondents. The tables below show the full range of responses at the top, and then a summary excluding the 'others paid / can't recall' in the bottom table. For tracking, the bottom 'filtered' data is used for comparison.*

As seen in previous surveys, average taxi fares were higher in Sydney than outside of Sydney, while average rideshare fares were both somewhat lower than average taxi fares and less variable across locations. Median fares (the point at which 50% of fares are cheaper and 50% more expensive) were also higher for taxis than rideshare in Sydney. In Sydney (where there is sufficient sample size for reliable analysis), around half of taxi fares were over $40, while just a third of rideshare fares were. The average taxi fare was similar to 2022 (when it was $53), while the average rideshare fare is up from $32 in 2022.

Figure 78: Last trip – Fares paid Q59
Top table: full responses; Bottom table: Excluding when others paid / can't recall

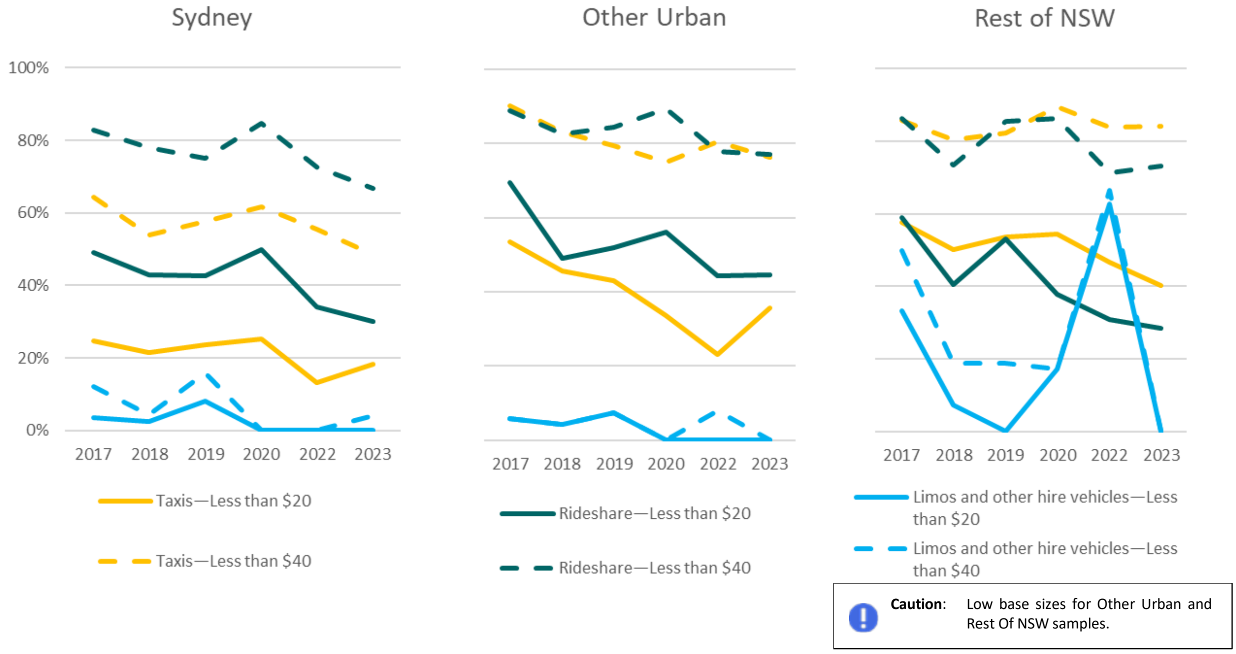
Last trip – Fares Paid *Full responses, recoded to categories*	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*790*	*121*	*48*	*47*	*23*	*4*
Less than $10	1%	1%	5%	1%	3%	0%	0%	0%	0%
At least $10 and less than $20	9%	21%	15%	17%	26%	14%	0%	0%	0%
Less than $20	**11%**	**22%**	**19%**	**18%**	**28%**	**14%**	**0%**	**0%**	**0%**
At least $20 and less than $30	10%	19%	18%	13%	18%	20%	2%	0%	0%
At least $30 and less than $40	7%	6%	3%	8%	3%	2%	0%	0%	0%
Less than $40	**28%**	**47%**	**40%**	**40%**	**49%**	**36%**	**2%**	**0%**	**0%**
At least $40 and less than $60	8%	9%	4%	8%	11%	5%	0%	0%	0%
At least $60 and less than $100	9%	4%	3%	8%	3%	8%	11%	10%	38%
At least $100 and less than $150	8%	1%	0%	2%	1%	0%	20%	9%	18%
$150 or more	4%	1%	1%	1%	0%	0%	25%	45%	18%
$40 or more	**29%**	**15%**	**8%**	**20%**	**15%**	**13%**	**56%**	**63%**	**74%**
I'm not sure because someone else paid	17%	18%	18%	14%	14%	18%	24%	22%	26%
Can't recall	26%	21%	34%	27%	23%	34%	17%	15%	0%

Last trip – Fares Paid ***Excluding:** Other paid / Can't recall*	**Taxis**			**Rideshare Services**			**Limousines or Other Hire Vehicles**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
*Sample size (after **excluding** other paid / can't recall)*	*272*	*60*	*58*	*465*	*74*	*24*	*28*	*15*	*3*
Less than $20	**18%**	**36%**	**40%**	**30%**	**45%**	**28%**	**0%**	**0%**	**0%**
Less than $40	**30%**	**41%**	**44%**	**37%**	**33%**	**45%**	**4%**	**0%**	**0%**
$40 or more	**52%**	**24%**	**16%**	**33%**	**23%**	**27%**	**96%**	**100%**	**100%**
Average fare (mean of exact $ estimates)	**$55**	**$30**	**$24**	**$39**	**$27**	**$30**	**$128**	**$220**	**$109**
Median (i.e. 50% more costly, 50% less costly)	**$42**	**$22**	**$20**	**$26**	**$20**	**$25**	**$120**	**$168**	**$103**

The median fare is less affected by the small number of extremely high fare estimates reported than is the mean / average.

The tracking charts for fares paid shows a spike in less expensive fares in 2020 for rideshare in both Sydney and other urban areas. However, this spike was only seen for taxis in Sydney. Overall, the tracking shows that the proportion of all fares under $20 (solid lines) and under $40 (dashed lines) have been falling for both main types of point-to-point transport in both Sydney and other urban areas, and that this trend largely continues in 2023. The one difference is an increase in reported sub-$20 taxi fares in both locations. The tracking also shows the generally greater proportion of rideshare fares that fall under these thresholds than is the case for reported taxi fares.

Figure 79: Last trip – Change in fares paid [Excluding 'others paid / can't recall'] Q59



Fares for point-to-point transport are of course closely tied to length of trip, and so a further breakdown of fares by distance is useful. Sample sizes are small within individual distance categories, but in Sydney (where there are larger total samples), comparing taxi and rideshare fares by estimated length shows that Sydney users of rideshare services continue to report a lower average fare than users of taxi services for trips of the same approximately estimated length. This pattern has been apparent in previous years and strongly supports (or reinforces) the enduring perception that one of the primary advantages of rideshare compared to taxis is the cost or value proposition.

Average fare x distance	Taxis	Rideshare
Mean $ estimate	Sydney	Sydney
Less than 5 km	$16	$17
5 km to under 10 km	$33	$23
10 km to under 15 km	$54	$40
15 km to under 25 km	$81	$58
25 km to under 50 km	$104	$91
50 km or more	Low sample	Low sample
Total Sample	*193*	*328*

The detailed breakdown of taxi fares in Sydney (see next page) shows the average reported fare by respondents whose most recent taxi was obtained from a rank ($45) or by hailing ($42) were slightly lower than those obtained by calling a taxi company ($50) or by 'other methods' ($58).

Figure 80: Detailed fare paid by methods of obtaining a taxi Q59

Last trip – Fare paid x method	Taxi		
Base: Used in the last 6 months	Sydney	Other Urban	Rest of NSW
Rank Average:	**$45**	**$20**	**$25**
Less than $10	1%	0%	5%
At least $10 and less than $20	9%	26%	0%
At least $20 and less than $30	11%	16%	19%
At least $30 and less than $40	6%	7%	0%
At least $40 and less than $60	13%	7%	5%
At least $60 and less than $100	14%	0%	12%
At least $100 and less than $150	12%	0%	0%
$150 or more	4%	0%	0%
I'm not sure because someone else paid	*7%*	*16%*	*10%*
Can't recall	*22%*	*29%*	*50%*
Sample	140	31	13
Hail Average:	**$42**	**$17**	-
Less than $10	1%	0%	0%
At least $10 and less than $20	20%	75%	0%
At least $20 and less than $30	10%	12%	0%
At least $30 and less than $40	12%	12%	0%
At least $40 and less than $60	4%	0%	0%
At least $60 and less than $100	3%	0%	0%
At least $100 and less than $150	9%	0%	0%
$150 or more	1%	0%	0%
I'm not sure because someone else paid	*17%*	*0%*	*31%*
Can't recall	*23%*	*0%*	*69%*
Sample	84	6	3
Called taxi company Average:	**$50**	**$32**	**$41**
Less than $10	1%	0%	5%
At least $10 and less than $20	5%	12%	19%
At least $20 and less than $30	8%	23%	21%
At least $30 and less than $40	9%	9%	2%
At least $40 and less than $60	3%	12%	4%
At least $60 and less than $100	14%	7%	2%
At least $100 and less than $150	4%	0%	0%
$150 or more	4%	0%	1%
I'm not sure because someone else paid	*28%*	*25%*	*16%*
Can't recall	*23%*	*14%*	*31%*
Sample	93	36	77
All other methods Average:	**$58**	**$44**	**$26**
Less than $10	1%	4%	4%
At least $10 and less than $20	6%	13%	12%
At least $20 and less than $30	10%	19%	11%
At least $30 and less than $40	5%	0%	6%
At least $40 and less than $60	9%	12%	0%
At least $60 and less than $100	7%	7%	6%
At least $100 and less than $150	8%	3%	0%
$150 or more	4%	3%	0%
I'm not sure because someone else paid	*19%*	*14%*	*32%*
Can't recall	*32%*	*25%*	*30%*
Sample	143	23	16

Fare estimates

The proportion of hire vehicle users who reported getting a fare estimate has been measured for several years. In 2023 this question was also asked for taxi users. Between 85% and 92% of rideshare users across locations reported getting a fare estimate (all similar to 2022, and higher than the 77%-79% in 2019 and 2020). Much fewer taxi users reported receiving a fare estimate (23% in Sydney, and 13%-14% outside of Sydney).

Figure 81: Last trip – Prevalence of being given a fare estimate for hire vehicle bookings Q58

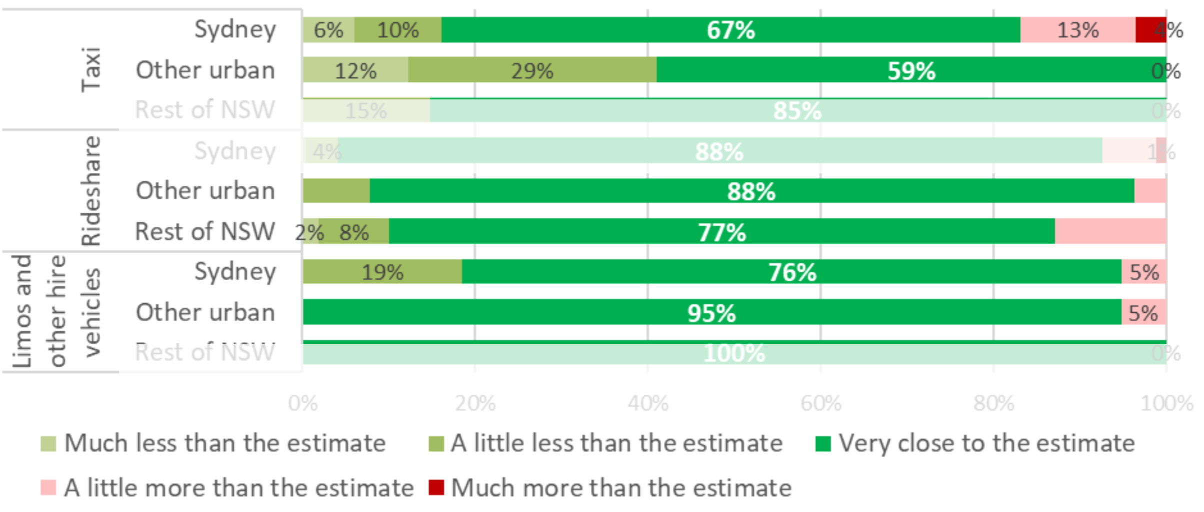
Last trip – Given fare estimate	Taxi			Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Yes	23%	14%	13%	85%	90%	92%	60%	91%	100%
No	59%	71%	77%	6%	5%	1%	22%	0%	0%
Can't recall	18%	14%	10%	9%	6%	7%	18%	9%	*0%*

While rideshare fare estimates are not quite as common as waiting time estimates, they are still perceived as being more accurate.

In Sydney and other urban areas 88% of rideshare customers given a fare estimate said the estimate was *very close to the final fare*, the same as 2020 and 2022. Fewer taxi customers in Sydney given a fare estimate rated it *very close to the final fare* (67%), but of those who did not half of them reported the actual fare was less than the estimate.

Results are not substantially different from those seen in previous surveys.

Figure 82: Last trip – Accuracy of fare estimate for rideshare and hire vehicle bookings Q60



Base = Last trip within 6 months and given a fare estimate [Sydney n=30-672; Other Urban n=15-107; Rest of NSW n=4-43]

Comparing fares

A substantial minority of rideshare users compare prices for different hire vehicles prior to booking their trip. In Sydney, in 2023 31% of rideshare users did, compared to 37% of limousine / other hire vehicle users. In Other Urban areas 22% of rideshare users did. These figures are not consistently or substantively different to those seen in previous surveys (and sample sizes for the rest of NSW and for limousine or other hire vehicle users are too small and variable for confident interpretation of trends).

Comparing prices on the internet or by using apps remains by far the most common method – being used by the great majority of all respondents who had compared prices.

Figure 83: Last trip – Comparing fares Q56

Last trip – Comparing fares	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*791*	*121*	*48*	*47*	*23*	*4*
Yes – on the internet or using apps	26%	20%	9%	15%	44%	38%
Yes – by phoning around	3%	1%	1%	14%	12%	26%
Yes – in some other way	3%	0%	0%	8%	0%	0%
No	*69%*	*78%*	*90%*	63%	43%	*36%*

Reasons for *not* comparing fares in Sydney were almost identical to those reported in 2020 and 2022, but the proportion who were happy with the price estimate given (49%) is lower than the 57% seen in 2019. In other urban areas the proportion who reported not comparing because they were happy with the price estimate has dropped from 61% in 2019 to 47% in 2023. As noted in other places in the 2022 and 2023 reports, this is consistent with other results suggesting rideshare fares are not seen as quite such strong value in the last few years.

Figure 84: Last trip – Reasons for not comparing fares Q57

Last trip –Reasons for not comparing fares	Rideshare			Limousines or other hire vehicle services		
Base: Used the type of transport in the last 6 months AND did not compare fares before trip	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*553*	*93*	*42*	*32*	*10*	*2*
I always use that provider or service	49%	51%	41%	55%	57%	100%
I was happy with the price estimate I was given	49%	47%	64%	19%	34%	0%
Some other reason	12%	14%	14%	28%	9%	0%

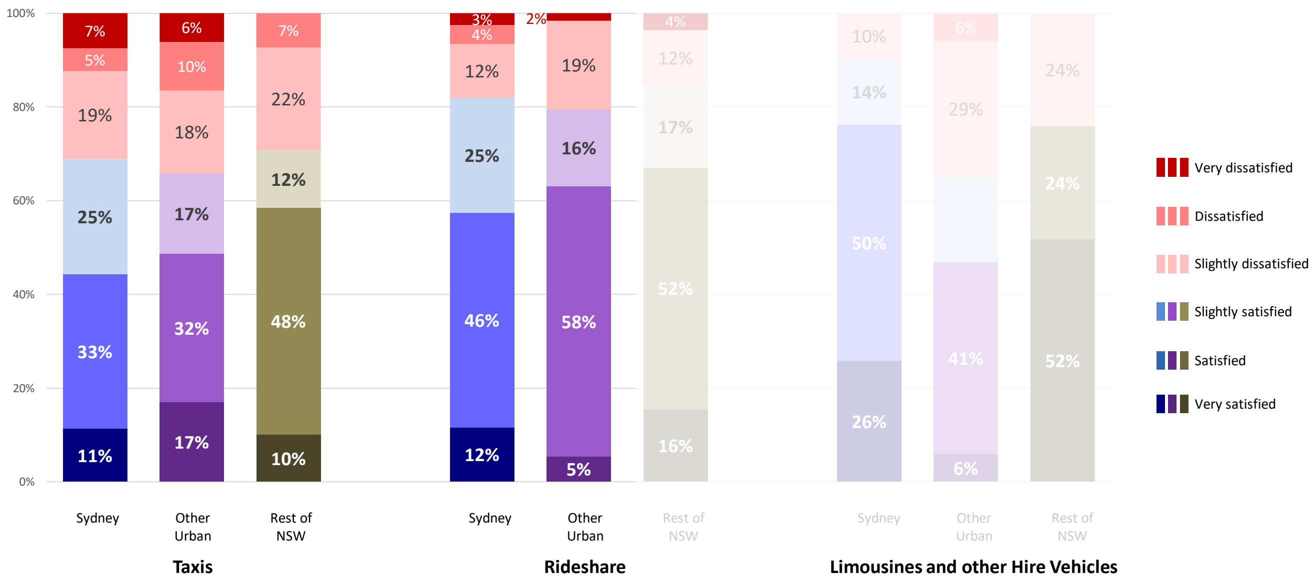
Satisfaction with fares

In line with the generally more positive perceptions of the cost and value of rideshare services compared to taxis, users of rideshare services are usually considerably more satisfied with the fare they paid for their last trip than are users of taxis.

This pattern is present in 2023, with 13% more rideshare users in all locations indicating they were *at least slightly satisfied* with their last fare compared to taxi users. The proportion of taxi users who said they were *dissatisfied* or *very dissatisfied* remains higher than for rideshare.

In 2023 users in other urban areas were a little more likely than those in Sydney to report they were *satisfied or very satisfied*, but also slightly more likely to be *dissatisfied*.

Figure 85: Last trip – Satisfaction with fares (if aware of amount) Q61

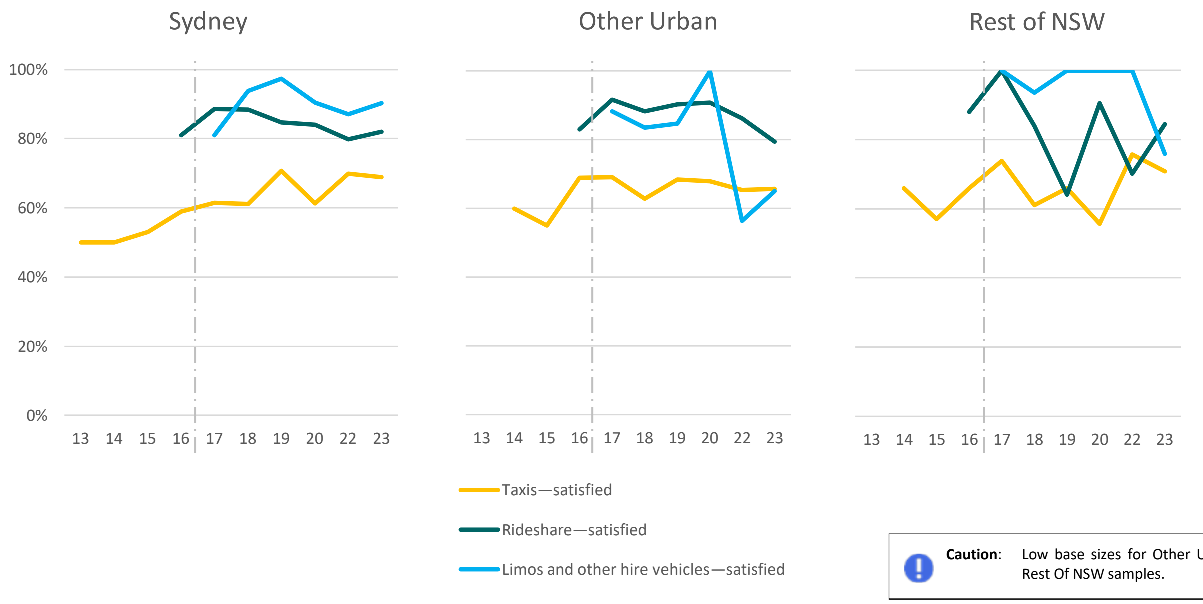


Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*272*	*60*	*58*	*466*	*74*	*24*	*28*	*15*	*3*
Very Satisfied	11%	17%	10%	12%	5%	16%	26%	6%	52%
Satisfied	33%	32%	48%	46%	58%	52%	50%	41%	24%
Slightly satisfied	25%	17%	12%	25%	16%	17%	14%	18%	0%
Total satisfied	**69%**	**66%**	**71%**	**82%**	**79%**	**84%**	**90%**	**65%**	**76%**
Slightly dissatisfied	19%	18%	22%	12%	19%	12%	10%	29%	24%
Dissatisfied	5%	10%	7%	4%	0%	0%	0%	6%	0%
Very dissatisfied	7%	6%	0%	3%	2%	4%	0%	0%	0%
Total dissatisfied	**31%**	**34%**	**29%**	**18%**	**21%**	**16%**	**10%**	**35%**	**24%**

Despite some fluctuations during COVID, satisfaction with taxi fares in Sydney has trended somewhat higher, while satisfaction with rideshare fares has fallen a little. Despite this overall narrowing, satisfaction with rideshare fares remains clearly higher, and the gap was slightly bigger in 2023.

In other urban areas the gap between satisfaction with rideshare and taxi fares has remained more consistent. In 2023 satisfaction with rideshare fares has fallen for a second survey, while satisfaction with taxi fares has been effectively stable.

Figure 86: Last trip – Change in satisfaction with fares (if aware of amount) Q61



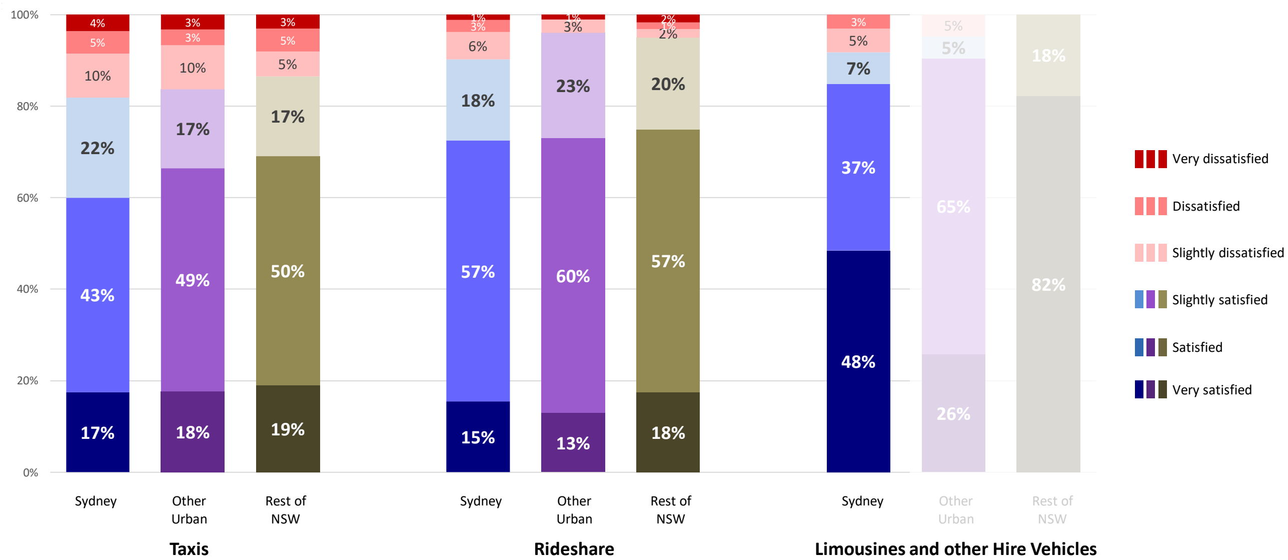
Caution: Low base sizes for Other Urban and Rest Of NSW samples.

Overall Trip Satisfaction

Overall trip satisfaction remains high amongst users, across all locations and service types. In every combination, even where small samples were available, at least 4-in-5 recent users once again indicated they were *at least slightly satisfied* with their last trip using point-to-point transport. This suggests that overall, the point-to-point transport service in NSW is largely meeting the needs and expectations of people who successfully access it.

- Satisfaction is higher for rideshare (90%-96%) than for taxis (82%-86%) – a pattern that has generally been seen in most surveys. The biggest difference is in Sydney, where 72% of rideshare users were *satisfied or very satisfied*, compared to 60% of taxi users.
- There is no substantive differences in satisfaction by areas. If anything, it is again slightly lower in Sydney than in Other Urban areas. Satisfaction with rideshare is more consistent across areas.

Figure 87: Last trip – Overall Satisfaction with last trip Q62

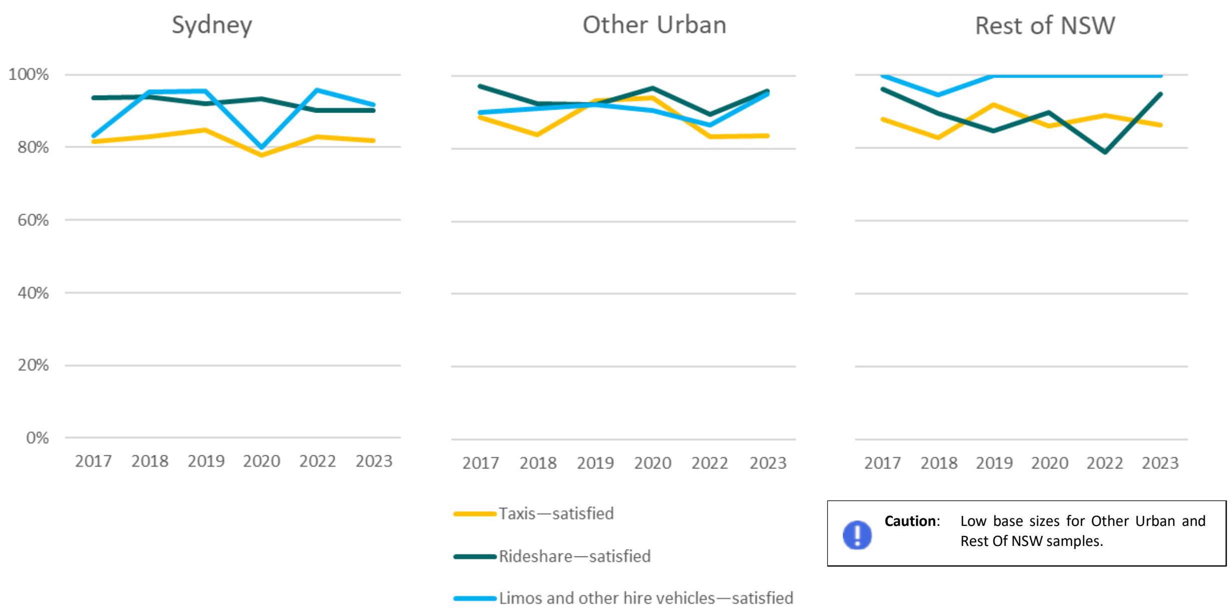


Last trip – Overall waiting time	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Very Satisfied	17%	18%	19%	15%	13%	18%	48%	26%	82%
Satisfied	43%	49%	50%	57%	60%	57%	37%	65%	18%
Slightly satisfied	22%	17%	17%	18%	23%	20%	7%	5%	0%
Total satisfied	**82%**	**84%**	**86%**	**90%**	**96%**	**95%**	**92%**	**95%**	**100%**
Slightly dissatisfied	10%	10%	5%	6%	3%	2%	5%	5%	0%
Dissatisfied	5%	3%	5%	3%	0%	1%	3%	0%	0%
Very dissatisfied	4%	3%	3%	1%	1%	2%	0%	0%	0%
Total dissatisfied	**18%**	**16%**	**14%**	**10%**	**4%**	**5%**	**8%**	**5%**	**0%**

Overall last trip satisfaction has generally shown a small advantage for rideshare over taxis in Sydney and other urban areas, with the two more equivalent on user satisfaction in the rest of NSW. Though it remains a less-used service, user satisfaction with limousines or other hire vehicles remains very high.

- In Sydney, overall last trip satisfaction with both taxis and rideshare has remained quite stable in the six years of the current survey methodology. From 2017-2019 the gap in satisfaction between taxis and rideshare narrowed slightly, before increasing in 2020 (when COVID seemed to impact taxi use more so than rideshare use). However in 2022 and 2023 the gap has closed again, with results similar to those seen in 2019 and 2020.
- In Other Urban areas rideshare satisfaction has consistently been a little higher than taxis. This had narrowed to be virtually identical in 2019 and 2020, but in 2023 user satisfaction with rideshare improved more than for taxis, and the gap is currently the largest that has been seen.
- Sample sizes in the Rest of NSW are too small for any detailed analysis, but the overall pattern suggests overall user satisfaction levels are reasonably similar between taxis and rideshare.

Figure 88: Last trip – Change in overall Satisfaction with last trip Q62



COVID Considerations

In 2020 a number of additional questions were included in the last trip section of the survey specifically relating to COVID considerations, and these were retained for the 2022 survey. In 2023 the question wordings were updated slightly to reflect the less-acute ongoing current COVID situation.

Confidence when using

Confidence using point-to-point transport in 2023 COVID conditions is somewhat higher than it was in 2020 and 2022.

In Sydney, 57% of taxi users and 62% of rideshare users were *totally or very confident* using the service given the COVID conditions at the time of their last trip, and these figures were a little higher for both services outside of Sydney.

Confidence with both services has increased from 2022, when the comparison figures were 50% and 49% respectively. Confidence with taxis is significantly higher than in 2020, when just 37% of Sydney users were *totally or very confident*. Confidence is also trending higher outside of Sydney in 2023.

Figure 89: Last trip – Confidence using point-to-point transport given COVID conditions Q62A

Last trip –Confidence using in a COVID environment	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Totally confident	25%	28%	24%	25%	30%	38%	52%	43%	82%
Very confident	32%	33%	39%	36%	37%	32%	22%	35%	18%
Totally + very confident	**57%**	**61%**	**63%**	**62%**	**68%**	**70%**	**73%**	**78%**	**100%**
Somewhat confident	36%	34%	32%	32%	29%	20%	21%	22%	0%
Not very confident	6%	5%	3%	5%	3%	7%	6%	0%	0%
Not at all confident	1%	0%	2%	1%	0%	3%	0%	0%	0%
Not very + Not at all confident	**7%**	**5%**	**5%**	**6%**	**3%**	**10%**	**6%**	**0%**	**0%**

Cleanliness and sanitising

No more than 5% of point-to-point transport users rated the cleanliness and sanitisation of their last trip vehicle as *unacceptable* from a COVID perspective in 2023. Generally, rideshare users are a little more likely than taxi users to describe the cleanliness and sanitising as *good* rather than *acceptable*.

These figures are almost identical to 2022. The proportion of *good* ratings for taxis in Sydney had increased from 33% in 2020 to 45% in 2022, while the ratio of *good* to *acceptable* ratings had remained fairly consistent for taxis outside of Sydney and for rideshare in all locations from 2020 to 2022.

Figure 90: Last trip – Perceptions of cleanliness and sanitising Q62B_1

Last trip – cleanliness and sanitising	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*8*
Good	42%	46%	54%	50%	54%	54%	79%	83%	100%
Acceptable	53%	53%	42%	48%	45%	42%	21%	17%	0%
Unacceptable	**5%**	**1%**	**5%**	**2%**	**1%**	**5%**	**0%**	**0%**	**0%**

Maintaining social distancing

Similarly, and consistent with 2020 and 2022, very few users of point-to-point transport rated the maintenance of social distancing on their last trip as *unacceptable* (0%-5%). Compared to 2022, users of both taxis and rideshare in Sydney and other urban areas were less likely to describe the maintenance of social distancing as *good* in 2023.

Rideshare was also a little more likely to be rated as *good* than as *acceptable.*

Figure 91: Last trip – Perceptions of maintaining social distancing Q62B_2

Last trip – maintaining social distance	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*8*
Good	40%	38%	46%	46%	49%	51%	72%	61%	100%
Acceptable	55%	61%	48%	51%	50%	45%	28%	39%	0%
Unacceptable	**5%**	**1%**	**6%**	**2%**	**1%**	**3%**	**0%**	**0%**	**0%**

Use of masks

Use of masks was moderately common at the time of last trips in 2020 (noting that these could have been up to six months prior to the survey and rules or expectations about mask use varied across that time), but was dramatically higher in the 2022 survey. In 2020 respondents reported that rideshare drivers were much more likely to have worn a mask, especially outside of Sydney. In 2022, while taxi users reported slightly less use of masks compared to rideshare, this was only to a small extent, and the great majority of respondents reported masks being used by both drivers and passengers.

In 2023 mask use in point-to-point transport by both passengers and drivers has reduced significantly. Generally, a little over 1-in-3 drivers were reported to have been wearing masks on users' last trip, while taxi users (31%-44%) were much more likely to have worn a mask themselves than were rideshare users (19%-25%).

Figure 92: Last trip – Use of masks Q62C/D

Last trip – use of masks	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Driver wore a mask	34%	40%	34%	34%	36%	47%	42%	44%	74%
Respondent wore a mask	36%	44%	31%	24%	19%	25%	28%	52%	36%
All other passengers wore a mask *Excludes 'not applicable'*	36%	34%	26%	22%	14%	24%	20%	38%	40%

Users generally don't mind whether or not drivers wear masks. Just 23%-30% of taxi users prefer drivers to wear masks, and even fewer rideshare users do (8%-24%).

Figure 93: Driver use of masks Q62D

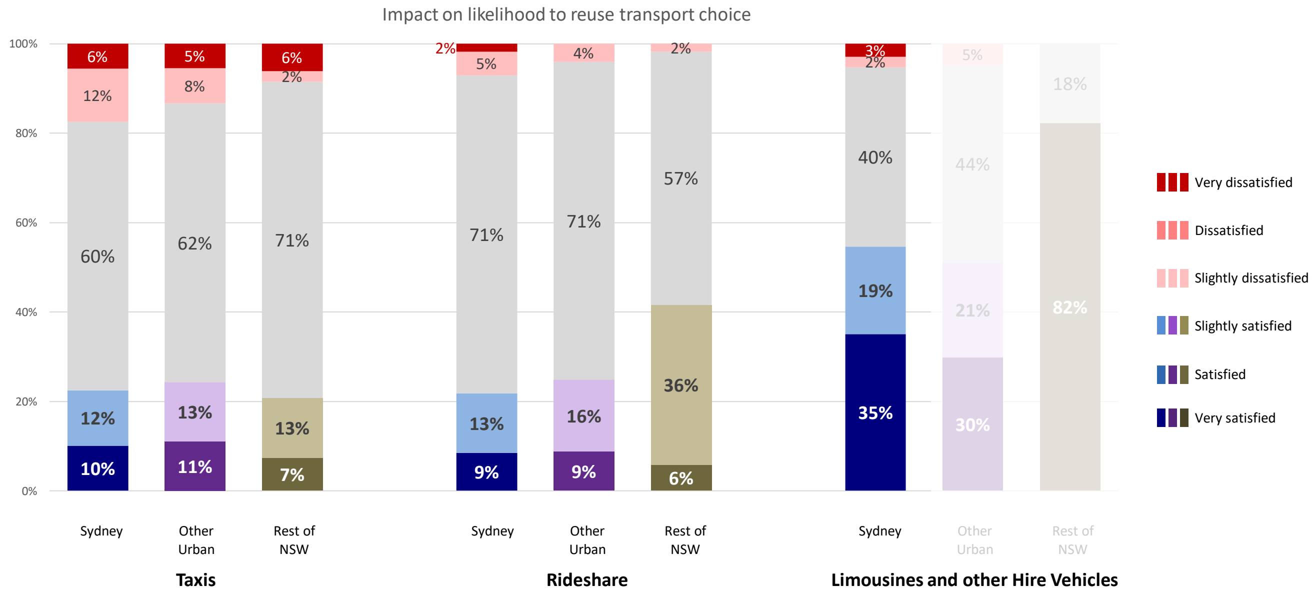
Driver use of masks	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Passengers whose driver did not wear a mask	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*303*	*56*	*72*	*512*	*77*	*27*	*28*	*13*	*0*
Yes, I think drivers should always wear a mask	11%	11%	9%	9%	3%	7%	8%	7%	0%
Yes, I prefer for drivers to wear a mask	19%	17%	14%	15%	5%	10%	22%	14%	0%
I don't mind either way	65%	55%	68%	71%	84%	71%	66%	66%	100%
No, I prefer drivers not to wear a mask	5%	16%	10%	5%	8%	12%	4%	14%	0%

G. Impact of experiences on point-to-point transport

Impact of last trip experience

For the majority of point-to-point transport users, the experience of their most recent trip has no impact on their expectation of using the service again – but for a minority it does.

Figure 94: Last trip – Impact on likelihood to re-use the transport service again Q63



Last trip – Impact on using again	Taxis			Rideshare Services			Limousines or Other Hire Vehicles		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*460*	*96*	*109*	*791*	*121*	*48*	*47*	*23*	*4*
Much more likely to use it again	10%	11%	7%	9%	9%	6%	35%	30%	82%
A little more likely to use it again	12%	13%	13%	13%	16%	36%	19%	21%	0%
Total more likely to re-use	**23%**	**24%**	**21%**	**22%**	**25%**	**42%**	**55%**	**51%**	**82%**
Had no impact	60%	62%	71%	71%	71%	57%	40%	44%	18%
A little less likely to use it again	12%	8%	2%	5%	4%	2%	2%	5%	0%
Much less likely to use it again	6%	5%	6%	2%	0%	0%	3%	0%	0%
Total less likely to re-use	**17%**	**13%**	**8%**	**7%**	**4%**	**2%**	**5%**	**5%**	**0%**
Differential impact (More likely minus less likely)	**+5%**	**+11%**	**+12%**	**+15%**	**+21%**	**+40%**	**+49%**	**+46%**	**+82%**

For taxis, in 2023 slightly more users reported the last experience made them more likely to use taxis again than reported it made them less likely to do so. The proportion more likely to reuse taxis was the same across locations, but those in Sydney were most likely to say the experience negatively impacted their expectations to use taxis again.

For rideshare users, in Sydney and other urban areas they were similarly likely as taxi users to say the experience increased their expectations of using rideshare again – but considerably less likely to say it decreased their expectations to do so. Of the small number of rideshare users in the rest of NSW, 2-in-5 said they expected to use rideshare more as a result of the experience of their last trip.

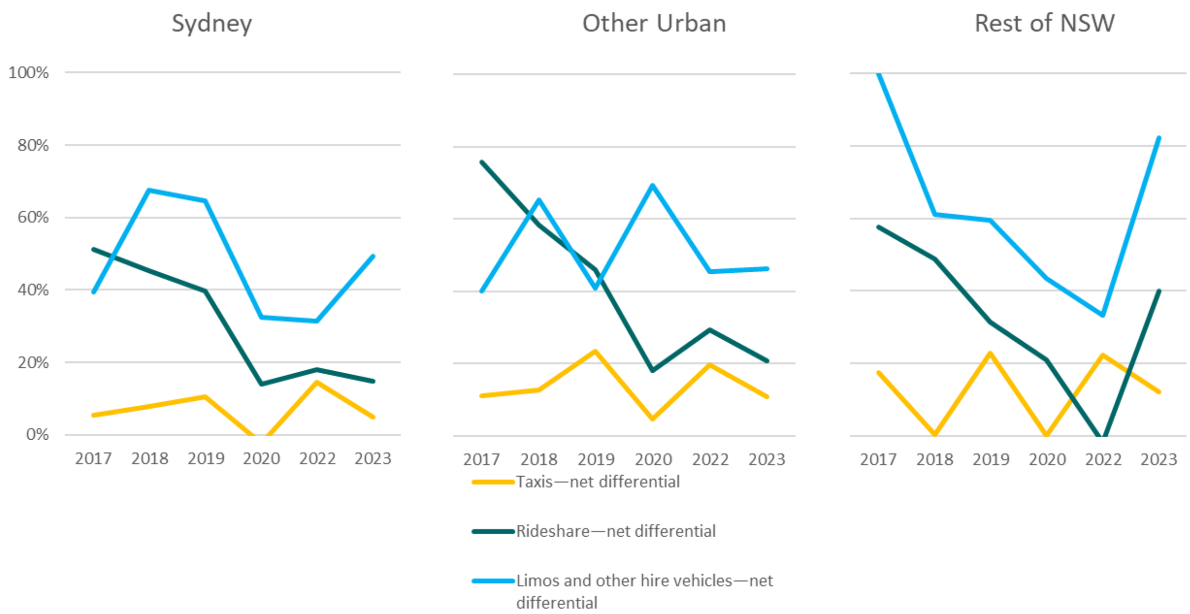
The charts tracking the nett differential in terms of impact on likelihood to re-use a form of point-to-point transport show quite different patterns for each service type.

As the most mature service, it would be expected that each experience of using taxis would have less impact on expectations to re-use, and this is what is observed. Across all locations there has generally been a slightly positive nett differential for taxis, but generally limited to no more than +20%. In 2023, these nett differentials are all lower than seen in 2022 when they spiked sharply positive after falling in 2020.

For rideshare, a very different pattern has been apparent. As the least established service, individual experiences are likely to have a greater impact on future intentions. As perceptions of rideshare have also been strong in the past five surveys, this has translated to a higher nett positive differential – but one that has been diminishing as more and more users become familiar with it and the service becomes more mature in those markets. Reported satisfaction with rideshare in this time has remained strong, and mostly stronger than taxis. The combination of these two influences results in higher nett differentials for rideshare, but which are becoming lower overall. While they are still higher than for taxis, this is now only by a small margin.

Use of and perceptions of limousines and other hire vehicles are subject to the fluctuations due to lower use and unknown user familiarity with the specific experience, and are therefore harder to interpret. Nett differentials amongst users remain positive and relatively large, suggesting that for most users the experience remains a positive and reinforcing one.

Figure 95: Last trip – Change in impact on likelihood to re-use the transport service again Q63



Impact of COVID

The COVID-19 pandemic was the defining event of 2020-21-22, and the point-to-point transport surveys during this period confirmed that usage and expectations of usage of such transport services was significantly impacted. The 2020 survey showed a larger initial impact on use of taxis than on rideshare, but the last three surveys have indicated that while *volumes* of use reduced, *patterns* of use through the pandemic were not actually that different.

Two new questions were introduced in the 2020 survey to explicitly explore the impact of COVID on the likelihood and confidence to use point-to-point transport services, and they were repeated in 2022 and 2023.

Both showed a substantial (and similar) nett negative impact across 2020 and 2022. In 2023 respondents indicated the perceived impact on the level of use and confidence in using point-to-point transport remains a nett negative one, though not to quite the same extent as seen 12 months earlier.

Across all locations and types of transport, a nett differential of -11% to -23% in the level of use of point-to-point transport as a result of COVID was reported, reduced from the -21% to -31% reported in 2022. The nett differentials for taxis and rideshare were very similar outside of Sydney, but in Sydney the nett differential for taxis was -23% and for rideshare was -11%.

Similarly, the nett negative impact on confidence using point-to-point transport was lower in 2023 (-9% to -19%) compared to the 2022 survey (-17% to -27%); and was similar for taxis and rideshare outside Sydney, but greater in Sydney for taxis (-17%) than for rideshare (-9%).

Figure 96: Perceived impact of COVID-19 Q77

Impact of COVID-19 on: **Your likelihood of using**	Taxis			Rideshare			Limousines or other hire vehicles		
Base: All respondents	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2030*	*530*	*416*	*2030*	*530*	*416*	*2030*	*530*	*416*
Higher	7%	7%	4%	13%	9%	6%	7%	5%	2%
Same	62%	67%	72%	64%	65%	71%	70%	72%	74%
Lower	30%	26%	24%	23%	26%	23%	23%	23%	24%
Differential Higher *minus* lower	**-23%**	**-19%**	**-19%**	**-11%**	**-17%**	**-18%**	**-16%**	**-18%**	**-22%**

Impact of COVID-19 on: **Your confidence in using**	Taxis			Rideshare			Limousines or other hire vehicles		
Base: All respondents	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW	Sydney	Other urban	Rest of NSW
Sample size	*2030*	*530*	*416*	*2030*	*530*	*416*	*2030*	*530*	*416*
Higher	6%	5%	3%	11%	8%	4%	7%	5%	3%
Same	71%	77%	76%	70%	70%	74%	73%	77%	75%
Lower	23%	18%	21%	19%	22%	22%	20%	19%	22%
Differential Higher *minus* lower	**-17%**	**-13%**	**-18%**	**-9%**	**-15%**	**-17%**	**-14%**	**-14%**	**-19%**

Impact of general experiences and events

A new question in the 2023 survey asks respondents if there is "*anything they have seen or heard lately*" that makes them feel more or less positive about using taxis or rideshare (the questions are asked separately, and allow for people to have seen or heard both positive and negative things).

The great majority of respondents (89%-93%) had not changed their views on either taxis nor rideshare as a result of recent observations or events. However, 3%-5% had seen something that made them feel more positive, and slightly more (5%-8%) something that made them feel less positive.

This pattern was generally consistent across locations and between taxis and rideshare, though the differential was 1-3 percentage points more negative in each area for rideshare.

Figure 97: Thinking about mode of transport[Q79(a-b)]

Thinking about services	**Taxis**			**Rideshare Services**		
Base: Used the type of transport in the last 6 months	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*2030*	*530*	*416*	*2030*	*530*	*416*
More positive about using _____	4%	5%	3%	4%	3%	3%
Neither	91%	93%	92%	89%	92%	91%
Less positive about using _____	7%	5%	6%	8%	6%	8%
Nett differential More positive *minus* less positive	**-3%**	**-**	**-3%**	**-4%**	**-3%**	**-5%**

Where respondents indicated they had seen or heard something that made them feel more or less positive about taxis or rideshare, they were asked to provide some descriptions or comments. These were inputted to a machine learning program to identify the most prevalent themes. There were insufficient examples to break these down across non-Sydney regions, but the same broad themes emerged at the overall level and when looking just at Sydney. The themes shown below are in rank order of their prevalence overall.

	Taxis	**Rideshare**
Reasons to feel more positive	Perceived better or positive experiences of **safety** are commonly mentioned	The **convenience** of being able to book via the app and perceived short waiting times
	Availability and **convenience**, including apps making it easier to book taxis and be sure they are coming	When respondents feel that rideshare is **cheaper** than other forms of transport
	Good experiences of **customer service** and positive attitudes from drivers	Some respondents feel a sense of **safety** inherent in the tracking of rides
	When taxis are perceived to have **lower fares** than rideshare (including specific references to not having to worry about surge pricing)	**Availability** for respondents who feel that they have a better chance of actually getting a rideshare
		Hearing **positive stories** and feedback from other people, and a sense that rideshare is more common

	Taxis	Rideshare
Reasons to feel less positive	**Cost** is mentioned by most respondents who feel less positive about taxis	**Surge pricing** (including a number of strongly worded comments relating to the major train network outage)
	Driver attitude and poor **customer service** experiences (including refusal to accept fares)	**Safety** concerns were raised by some, including a lack of regulation and screening of drivers
	Availability issues and long waiting times	**Cost** where it is perceived that rideshare is more expensive than taxis at certain times
	Cleanliness and driver hygiene	**Poor customer service** experiences, including drivers cancelling trips and taking longer routes
	Unsafe experiences, including driving skills and some female customers feeling unsafe with male drivers	A sense of concern from some respondents about **unfair pay rates** for rideshare drivers

Broadly the considerations are similar for respondents across both services, and both for those who felt more positive and those who felt less positive – availability, cost, safety and the customer experience. The difference appear to be not so much in what people are considering, but the nature of the experiences they have and the way they then feel about the respective service.

H. Wheelchair Taxi Experiences

Very few respondents to the survey had a physical disability (4% in Sydney, 5% in other urban areas and 11% in the rest of NSW). Of these, only a small proportion can *only* use a wheelchair accessible vehicle (17% in Sydney, none in other urban areas, and 5% in the rest of NSW).

Of those few respondents with a disability and who have used point-to-point transport in the last six months, most had never used a wheelchair accessible taxi or rideshare in the last year. While the sample sizes are so small they can only be treated as indicative, this may have been more common amongst taxi users than rideshare users. Only around a quarter of those who had used a wheelchair taxi in the last year reported never transferring to a seat in the vehicle when they did.

Figure 98:Last 12 months–Wheelchair access and seat transfersQ75A-B

Use of wheelchair accessible vehicles	Taxi			Rideshare			Limousines or Other		
Base: Has a disability and has used ride share in the last 12 months.	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*31*	*9*	*17*	*16*	*1*	*1*	*0*	*1*	*0*
Always	10%	11%	6%	6%	0%	0%	-	0%	-
Most times	16%	22%	6%	0%	0%	0%	-	0%	-
Sometimes	6%	0%	12%	0%	0%	0%	-	0%	-
Rarely	10%	11%	6%	6%	0%	100%	-	0%	-
Never	**58%**	**56%**	**71%**	**88%**	**100%**	**0%**	-	**100%**	-

Transferred to a seat in the vehicle when using wheelchair accessible vehicles	Taxi			Rideshare			Limousines or Other		
Base: Has used wheelchair accessible service in the last 12 months.	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW	Sydney	Other Urban	Rest of NSW
Sample size	*13*	*4*	*5*	*2*	*0*	*1*	*0*	*0*	*0*
Always	38%	25%	40%	50%	-	0%	-	-	-
Most times	8%	25%	0%	50%	-	0%	-	-	-
Sometimes	15%	0%	40%	0%	-	0%	-	-	-
Rarely	15%	25%	0%	0%	-	100%	-	-	-
Never	**23%**	**25%**	**20%**	**0%**	-	**0%**	-	-	-

Payment assistance

Most respondents with a disability do not receive payment assistance for using taxis.

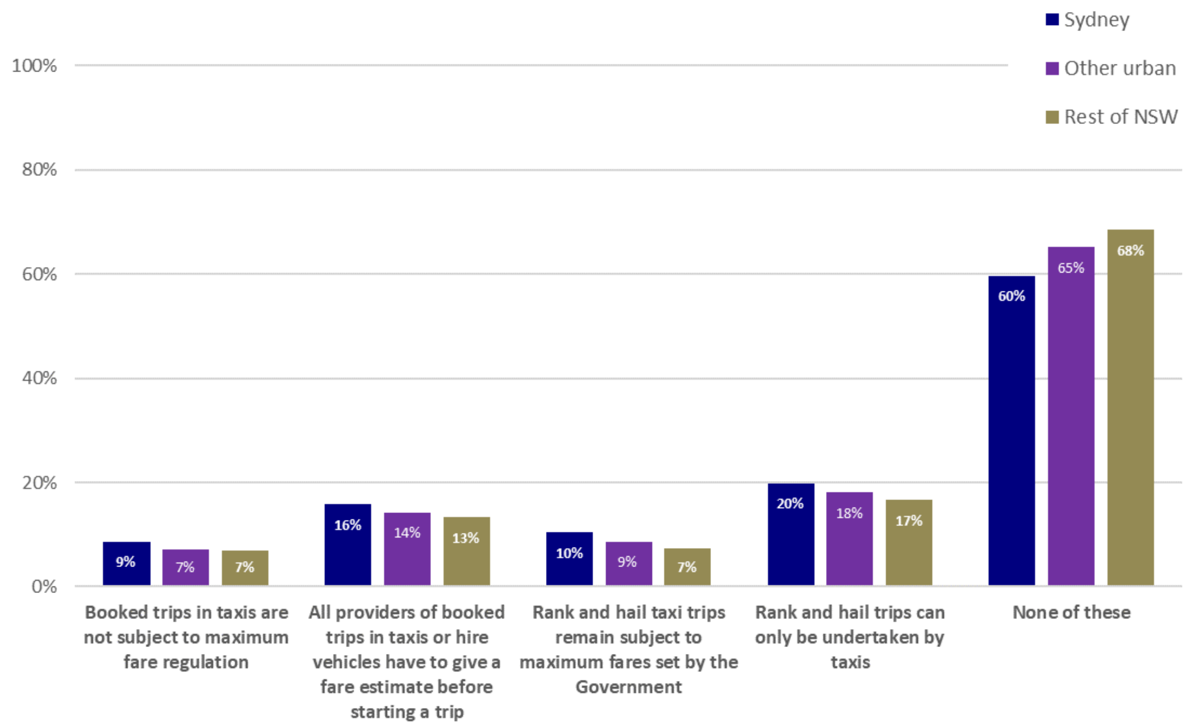
Sample size:	Sydney *97*	Other Urban *28*	Rest of NSW *52*
Taxi Transport Subsidy Scheme	19%	3%	13%
Department of Veteran Affairs	8%	7%	3%
Other	3%	0%	5%
Neither of these	70%	93%	79%

I. Awareness of Regulatory Changes

Respondents generally have limited awareness of rules and regulations that apply to point-to-point transport.

Across the three regions, in 2023 60%-68% were unaware of any of the current rules they were asked about (equal to 2022), with no more than 20% in any location aware of any specific rule or regulation. Patterns and levels of awareness in 2023 were nearly identical to those reported in 2022.

Figure 99: Awareness of rules and regulations that apply to point-to-point transport Q70



Appendix A: Questionnaire [2023 v2.3]

INTRODUCTORY TEXT

Who is conducting the survey?

This research is being conducted for the NSW Independent Pricing and Regulatory Tribunal by ORIMA Research and the ORU.

How long will the survey take?

This survey should take around 10 minutes to complete (depending on what comments you include when invited to provide additional information).

Is my participation voluntary?

Participation in this research is voluntary. You can choose not to answer any question. You can decide to stop at any time.

Is my confidentiality and information privacy ensured?

The information you provide will be treated as private and confidential. No individual will be able to be identified from the research results. Your answers will only be used for the purposes of the research.

At any time during or after the survey, you can ask that the information you provided not be used by ORIMA Research.

PART 1: QUOTA DEMOGRAPHICS

1. **What is your gender?**
   (1) Male
   (2) Female
   (3) Other
   (4) Prefer not to say

2. **Which age group are you in?**
   (1) Under 16 TERMINATE
   (2) 16 to19
   (3) 20 to 29
   (4) 30 to 39
   (5) 40 to 49
   (6) 50 to 59
   (7) 60 to 69
   (8) 70 to 79
   (9) 80 and over

3. **What is the postcode where you live?**

NUMERIC (4 DIGITS ONLY)

Use postcode to set [LOCATION] variable to Sydney, Wollongong, Newcastle, Gosford or Wyong, or "your local region".

4. **Which of these describe you?** ***Please select all that apply***

MULTIPLE RESPONSE

   (1) Working full-time
   (2) Working part-time
   (3) Full-time student
   (4) Part-time student
   (5) Unemployed
   (6) Household duties / caring for children
   (7) Retired
   (8) Disability / defence veteran or aged pensioner
   (9) Other

PART 2: AWARENESS AND USAGE OF SERVICES

This survey is about a range of transport options that you may use in [LOCATION].

ASK ALL

5. A "**taxi"** is a vehicle clearly marked as a taxi and with a TAXI or CAB sign on its roof. Are you aware of **taxis** operating in [LOCATION]?
    (1) Yes
    (2) No
    (3) Unsure

ASK IF AWARE OF TAXIS (IE: Q5 = 1)

6. When was the last time you used a **taxi** in [LOCATION]?
    (1) In the last 6 months
    (2) 7-12 months ago
    (3) Longer ago
    (4) Never
    (5) Can't recall

ASK ALL

7. Overall, [INSERT IF Q6=4-5 "even if you don't use the service"], how satisfied or dissatisfied are you with the **taxi** service in [LOCATION]?
    (1) Very satisfied
    (2) Satisfied
    (3) Neither satisfied nor dissatisfied
    (4) Dissatisfied
    (5) Very dissatisfied
    (6) Don't know

ASK ALL

There are several types of "**hire vehicle services"** that operate in NSW. Hire vehicle services **do not** include taxis, or rental cars that you can drive yourself. Hire vehicle services provide <u>a passenger service</u> to transport you by a motor vehicle from one point to another for the payment of a fare. They include rideshare services, limousines and other hire vehicle services such as airport shuttles in smaller vehicles.

8. Are you aware of any of the following types of **hire vehicle** services operating in [LOCATION]?

		Yes	No	Unsure
A	**Rideshare** services like Uber, Shebah, Ola or Didi	1	2	3
B	**Limousines** or **other hire vehicle services**	1	2	3

ASK IF AWARE OF ANY IN Q8 / SHOW ONLY THOSE AWARE OF IN Q8

9. When was the last time you used any of the following types of **hire vehicle** services in [LOCATION]?

		In the last 6 months	7-12 months ago	Longer ago	Never	Can't recall
A	**Rideshare service** (eg: Uber, Shebah, Ola or Didi)	1	2	3	4	5
B	**Limousines** or **other hire vehicle service**	1	2	3	4	5

ASK ALL

10. Across these different types of **hire vehicle** services – overall [INSERT IF Q9A OR B=4-5 ", even if you don't use this type of service,"] how satisfied or dissatisfied are you with the service in [LOCATION]?

		Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know
A	**Rideshare** services (eg: Uber, Shebah, Ola or Didi)	1	2	3	4	5	6
B	**Limousines** or **other hire vehicles service**	1	2	3	4	5	6

ASK ALL

There are several <u>other</u> types of **transport services** that are available in some parts of NSW. These types of transport are **not** considered 'hire vehicles'.

11. Are you aware of any of the following types of **transport services** operating in [LOCATION]?

		Yes	No	Unsure
A	**Community transport** - government-subsidised door to door transport available to eligible people experiencing transport disadvantage. A user charge generally applies.	1	2	3
B	**Courtesy Transport** - transport provided by pubs, clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.	1	2	3
C	**Car share** – a membership based service where people can rent vehicles to drive themselves for short periods of time (e.g. GoGet, Uber Carshare, Flexicar, Popcar).	1	2	3
D	**Bikeshare** – where you can make short-term use of push-bikes, either for free or for a small cost	1	2	3

ASK IF AWARE OF ANY IN Q11 / SHOW ONLY THOSE AWARE OF [Q11 = 1]

12. When was the last time you used any of the following types of **transport services** in [LOCATION]?

		In the last 6 months	7-12 months ago	Longer ago	Never	Can't recall
A	**Community transport** - government-subsidised door to door transport available to eligible people experiencing transport disadvantage. A user charge generally applies.	1	2	3	4	5
B	**Courtesy Transport** - transport provided by pubs, clubs or community organisations (eg, Lions, Rotary and churches) which is free of charge.	1	2	3	4	5
C	**Car share** – a membership based service where people can rent vehicles to drive themselves for short periods of time (e.g. GoGet, Uber Carshare, Flexicar, Popcar).	1	2	3	4	5
D	**Bikeshare** – where you can make short-term use of push-bikes, either for free or for a small cost	1	2	3	4	5

ASK IF USED TAXIS (Q6=1) OR ANY FORM OF HIRE VEHICLE (Q9A OR B=1)

SHOW ONLY TYPES OF TRANSPORT USED IN THE LAST 6 MONTHS

13. In the last 6 months, on average how many times have you used these types of transport to get around [LOCATION]?

		6 or more times per week	3-5 times per week	1-2 times per week	2-3 times per month	Once every month	Less often	Can't say
A	**Taxis**	1	2	3	4	5	6	7
B	**Rideshare services** (eg: Uber, Shebah, Ola or Didi)	1	2	3	4	5	6	7
C	**Limousines** or **other hire vehicle services**	1	2	3	4	5	6	7

ASK ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

14. In the last 6 months, have you had any experiences where you **tried to use** these types of transport services in [LOCATION] but were **not able to**?

		Yes	No
A	**Taxis**	1	2
B	**Rideshare services** (eg: Uber, Shebah, Ola or Didi)	1	2
C	**Limousines** or **other hire vehicle services**	1	2

ASK IF YES TO ANY IN Q14 / SHOW ONLY OPTIONS WITH CODE 1 IN Q14

15. On the last occasion you were unable to use [INSERT APPROPRIATE TEXT: "a taxi" OR "a rideshare service" OR "a limousine or other hire vehicle service" OR "a taxi or rideshare service" OR "a taxi or a limousine or other hire vehicle service" OR "a rideshare service, limousine or other hire vehicle service" OR "a taxi, rideshare service, limousine or other hire vehicle service"] what did you do instead? *Please select all that apply*

MULTIPLE RESPONSE

	A	B	C
	The last time you couldn't use a **taxi**	The last time you couldn't use a **rideshare service**	The last time you couldn't use a **limousine or other hire vehicle service**
Decided not to make the journey at all	1	1	1
Took a train	2	2	2
Took a regular bus (ie, not a courtesy bus)	3	3	3
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	4	4	4
Used courtesy transport provided by a venue such as a pub or club	5	5	5
Drove myself or got a lift	6	6	6
Used a rideshare service instead	7	7	7
Used a limousine or other hire vehicle service	8	8	8
Used a taxi instead	9	9	9
Walked or cycled	10	10	10
Used a bikeshare service	14	14	14
Used a car sharing service such as GoGet or Uber Carshare, Flexicar, Popcar	11	11	11
Something else	12	12	12
Can't recall	13	13	13

** **NOTE**: PEOPLE WHO ARE NOT AWARE OF TAXI [Q5=2-3] / HV SERVICES [Q9A AND B = 2-3] OR WHO HAVE NEVER USED THEM [Q6=4-5 AND Q9A AND B =4-5]: SKIP FROM HERE TO q20/21; AND THEN TO PART 4 (WORKPLACE POLICIES, Q32-33-34); AND THEN TO PART 6 (STRENGTHS AND WEAKENESSES, Q64 OWNARDS)**

PART 3: TAXIS AND HIRE VEHICLES GENERALLY

SHOW ONLY TYPES OF TRANSPORT EVER USED [Q6=1-3 or Q9A or B=1-3]

16. For each of the following – to get around [LOCATION] in the last 12 months, have you:

		Used them **more** than in the previous 12 months	Used them about the **same**	Used them **less** than in the previous 12 months	Can't say
A	**Taxis**	1	2	3	4
B	**Rideshare** services (eg: Uber, Shebah, Ola or Didi)	1	2	3	4
C	**Limousines** or **other hire vehicle services**	1	2	3	4

SHOW IF EVER USED TAXIS (Q6=1-3) AND USED HVs IN LAST 6 MONTHS (either Q9A OR B=1)

17. As a result of using [INSERT APPROPRIATE TEXT: "rideshare services" OR "limousines or other hire vehicle services" OR "rideshare services, limousines or other hire vehicle services", do you use **taxis** to get around [LOCATION]…
    (1) Not at all any more
    (2) A lot less
    (3) A little less
    (4) About as frequently as before
    (5) More

ASK IF USED TAXIS OR HIRE VEHICLES MORE OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=1)

18. You said you have used [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] more often in the last 12 months than the previous 12 months to get around [LOCATION]. Why is that? *Please select all that apply*

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED MORE IN Q16 [IE: CODE 1]

	A	B	C
	Why have you used **taxis** more often in the last 12 months	Why have you used **rideshare services** more often in the last 12 months	Why have you used **limousines or other hire vehicles** more often in the last 12 months
I find them less expensive than before	1	1	1
I have more disposable income	2	2	2
I'm going out more / needing to get around more	3	3	3
Because I don't have to wait as long to catch one, or I think one is more likely to turn up after I have booked it	4	4	4
I have less access to alternatives	5	5	5
Because the service for booking taxis over the phone has improved	6	6	6
Because it has become easier to book taxis with apps than it was	7	7	7
Because the service for booking is better than it used to be	8	8	8
I think drivers have become less inclined to take longer routes or overcharge me	9	9	9
Because I get a fare estimate quoted in advance	10	10	10
I have found that driver behaviour and knowledge has improved in [LOCATION, IF NOT A SPECIFIED CITY INSERT "my local region"]	11	11	11
Because they were not available previously or I did not know about them before then	12	12	12
Because of things related to COVID	14	14	14
For another reason	13	13	13

ASK IF USED TAXIS OR HIRE VEHICLES LESS OFTEN IN THE LAST 12 MONTHS (Q16A/B/C=3)

19. You said you have used [INSERT APPROPRIATE TEXT: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"] less often in the last 12 months than the previous 12 months to get around [LOCATION]. Why is that? *Please select all that apply*

MULTIPLE RESPONSES ALLOWED / SHOW ONLY OPTIONS USED LESS IN Q16

	A	B	C
	Why have you used **taxis** less often in the last 12 months	Why have you used **rideshare services** less often in the last 12 months	Why have you used **limousines or other hire vehicles** less often in the last 12 months
I find them more expensive than before	1	1	1
I have less disposable income	2	2	2
Because peak or surge pricing makes them too expensive	3	3	3
I'm going out less / have less need to get around	4	4	4
Because I find I have to wait longer than I used to catch a one, or I can't rely on one turning up after I have booked it	5	5	5
I have better access to a car	6	6	6
Public transport has improved when I need it	7	7	7
I use taxis instead	8	8	8
I use limousine or other hire vehicle services instead	9	9	9
I use rideshare services instead	10	10	10
I use car share, community transport or courtesy buses instead	11	11	11
Because booking services have become worse	12	12	12
I think drivers have become more inclined to take longer routes or overcharge me	13	13	13
I have found that driver behaviour and knowledge has become worse in [LOCATION, IF NOT A SPECIFIED CITY INSERT "my local region"]	14	14	14
Because of things related to COVID	16	16	16
For another reason	15	15	15

ASK Q20/21 FOR ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

20. What do you think of the **value for money** for fares to use [INSERT APPROPRIATE TEXT OPTION: "taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in [LOCATION]?

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

		Value of **taxis**			
		Good	OK	Poor	Can't say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

		Value of **rideshare** services (eg: Uber, Shebah, Ola, Didi)			
		Good	OK	Poor	Can't say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

		Value of **limousines** or **other hire vehicle services**			
		Good	OK	Poor	Can't say
A	Overall	1	2	3	4
B	During the day, and before 10pm	1	2	3	4
C	After 10pm - Sunday to Thursday	1	2	3	4
D	After 10pm - Friday and Saturday	1	2	3	4

21. What do you think of the **value for money** for fares to use [INSERT APPROPRIATE TEXT OPTION: "taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in [LOCATION]?

SHOW OPTIONS AWARE OF / SHOW ALL ON ONE SCREEN

		Value of **taxis**			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

		Value of **rideshare** services (eg: Uber, Shebah, Ola, Didi)			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

		Value of **limousines or other hire vehicle services**			
		Good	OK	Poor	Can't say
A	For short trips (under 5km)	1	2	3	4
B	For long distances (over 15km)	1	2	3	4

SHOW IF USE TAXIS (Q6=1) AND / OR HIRE VEHICLES (Q9A OR B=1) IN THE LAST 6 MONTHS

22. What methods have you used (or tried to use) to get ["taxis" OR "rideshare services" OR "limousines or other hire vehicle services" OR "taxis or rideshare services" OR "rideshare services, limousines or other hire vehicle services" OR "taxis, rideshare services, limousines or other hire vehicle services"] in the last 6 months in [LOCATION]?

MULTIPLE RESPONSE / SHOW ONLY OPTIONS USED IN LAST 6 MONTHS

		Pre-booking for a particular time or at least 15 minutes ahead (including regular bookings)	Booking – to come as soon as possible (including 'next available')	From a rank	By hailing in the street
A	**Taxis**	1	2	3	4
B	**Rideshare services** (eg: Uber, Shebah, Ola, Didi)	1	2		
C	**Limousines or other hire vehicle services**	1	2		

ASK IF USED / TRIED TO USE RANK OR HAIL TO GET TAXIS IN LAST 6 MONTHS (Q22A=3-4)

23. When you try to get a **taxi** at a rank or to hail one in the street – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET TAXIS IN LAST 6 MONTHS (Q22A=2)

24. When you try to get a **taxi** by booking one to come as soon as possible (including 'next available' bookings) – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET RIDESHARE IN LAST 6 MONTHS (Q22B=2)

25. When you try to use a **rideshare service** by booking one to come as soon as possible – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE ASAP BOOKING TO GET LIMO / OTHER HV LAST 6 MTHS (Q22C=2)

26. When you try to use **limousines or other hire vehicle services** by booking one to come as soon as possible – do you think the **typical time it takes to get one** is…

		Good	Reasonable	Poor	Can't say
A	During the day, and before 10pm	1	2	3	4
B	After 10pm - Sunday to Thursday	1	2	3	4
C	After 10pm - Friday and Saturday	1	2	3	4

ASK IF USED / TRIED TO USE RANK OR HAIL TO GET TAXIS IN LAST 6 MONTHS (Q22A=3-4)

27. What impact, if any, would it have on you if there was a **minimum fare** in [LOCATION] for any **taxi** caught from a rank or by hailing it in the street of…

		I would be **much less** likely to use ranks or hail a taxi	I would be **a little less** likely to use ranks or hail a taxi	It would make **no difference** to how often I would use a rank or hail a taxi	Can't say
A	$5	1	2	3	4
B	$7.50	1	2	3	4
C	$10	1	2	3	4
D	$12.50	1	2	3	4

ASK IF USED TAXIS (Q6=1-2) OR HIRE VEHICLES (Q9A OR B=1-2) IN LAST 12 MONTHS

28. In the past 12 months, which – if any – of the following **problems** have you personally experienced using [INSERT APPROPRIATE TEXT OPTION: “**taxis**” OR “**rideshare services**” OR “**limousines or other hire vehicle services**” OR “**taxis or rideshare services**” OR “**rideshare services, limousines or other hire vehicle services**” OR “**taxis, rideshare services, limousines or other hire vehicle services**”]?

MULTIPLE RESPONSE / IF CODE 10 SELECTED CANNOT SELECT ANY OTHER CODE IN **COLUMN**

SHOW OPTIONS USED IN LAST 12 MONTHS

	A	B	C
	Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
Difficulty getting one at a major event (ie: had to wait an unreasonably long time, or unable to get one at all)	11	11	11
I couldn’t get one when I wanted one some other time	1	1	1
I was overcharged	2	2	2
The driver did not take the most direct route	3	3	3
The driver did not know where they were going	4	4	4
The driver refused to take me somewhere after I told them where I was going	5	5	5
I felt unsafe because of the way the driver was driving, or the driver was breaking the road rules	6	6	6
The driver was rude, unhelpful, or offensive	7	7	7
The price during peak or surge pricing was too high	8	8	8
Concerns about cleanliness or hygiene during COVID	12	12	12
The condition of the vehicle	13	13	13
Something else	9	9	9
Had no problems	10	10	10

ASK IF SELECT SOMETHING ELSE CODE 9 IN Q28

29. What other problems did you experience.... SHOW IF CODE 9 SELECTED IN Q28

A	B	C
Using **Taxis**	Using **Rideshare services**	Using **Limousines or other hire vehicle services**
TEXT BOX	TEXT BOX	TEXT BOX

ASK IF USED TAXIS (Q6=1-2) OR HIRE VEHICLES (Q9A OR B=1-2) IN LAST 12 MONTHS

30. The last time you tried to use [INSERT APPROPRIATE TEXT OPTION BASED ON ANY ATTEMPT TO USE METHODS: "**taxis**" OR "**rideshare services**" OR "**limousines or other hire vehicle services**" OR "**taxis or rideshare services**" OR "**rideshare services, limousines or other hire vehicle services**" OR "**taxis, rideshare services, limousines or other hire vehicle services**"], what happened?

	A	B	C
	Last time trying to use a **taxi**	Last time trying to use a **rideshare**	Last time trying to use a **limousine or other hire vehicle service**
I was able to get one	1	1	1
It didn't turn up after I had booked it	2	2	2
No taxi came to the rank	3		
No taxi was available to hail on the street	4		
Can't recall	5	5	5

ASK ONLY IF ANY CODE 2-4 IN Q30 AND MATCHING CODE 2 IN Q14 [IE: Q14A=2 AND Q30A=2-4; OR Q14B=2 AND Q30B=2; OR Q14C=2 AND Q30C=2]

31. When you were unable to use a [INSERT APPROPRIATE TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**" OR "**taxi or rideshare service**" OR "**rideshare service, limousine or other hire vehicle service**" OR "**taxi, rideshare service, limousine or other hire vehicle service**"], what did you do instead?

MULTIPLE RESPONSE / SHOW OPTIONS WHERE CODE 2-4 SELECTED IN Q30

PROG NOTE: NOTE THAT TEXT INSERT OPTIONS IN THE QUESTION WORDING ARE SINGULAR, NOT PLURAL AS IN MOST OTHER QUESTIONS

	A	B	C
	Last time trying to use a **taxi**	Last time trying to use a **rideshare service**	Last time trying to use a **limousine or other hire vehicle service**
Decided not to make the journey at all	1	1	1
Took a train	2	2	2
Took a regular bus (ie, not a courtesy bus)	3	3	3
Used community transport (provided in a vehicle other than a taxi or hire vehicle)	4	4	4
Used courtesy transport provided by a venue such as a pub or club	5	5	5
Drove myself or got a lift	6	6	6
Used a rideshare service instead	7	7	7
Used a limousine or other hire vehicle service	8	8	8
Used a taxi instead	9	9	9
Walked or cycled	10	10	10
Used a bikeshare service	13	13	13
Used a car sharing service such as GoGet or Uber Carshare, Flexicar, Popcar	11	11	11
Something else	12	12	12
Can't recall	13	13	13

PART 4: WORKPLACE POLICY

ASK IF EMPLOYED (Q4=1-2)

ASK EVEN IF NOT AWARE OF OR USE ANY TRANSPORT SERVICES

32. Does your workplace at least sometimes pay for staff to travel for work-related purposes using:

		Yes	No	Don't know
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle services** (eg: Uber, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

33. In the last 12 months, has your employer: SHOW ONLY OPTIONS SELECTED IN Q32

		Allowed staff to use this service more than in previous years	Required staff to use this service less than in previous years	Made no changes to policy or preference that you know of
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1-2 TO AT LEAST ONE IN Q33

33a. Is the change in your employer's views on employee transport related to COVID : SHOW ONLY OPTIONS SELECTED IN Q33

		Completely related to COVID	Partly related to COVID	Not related to COVID
A	**Taxis**	1	2	3
B	**Any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)	1	2	3

ASK ONLY IF CODE 1 TO AT LEAST ONE IN Q32

34. Thinking about staff using **taxis** or **any rideshare, limousine or other hire vehicle** services (eg: Uber, Shebah, Ola, Didi)… does your workplace:
    (1) Have a **policy** to only use **taxis**
    (2) Have a **preference** for **taxis**
    (3) Have **no** preference or policy either way
    (4) Have a **preference** for **any rideshare, limousine or other hire vehicle** services
    (5) Have a **policy** to only use **any rideshare, limousine or other hire vehicle** services
    (6) Don't know

PART 5: LAST TRIP SECTION – BASED ON LAST TRIP

IF NOT USED A TAXI IN THE LAST 6 MONTHS (Q6=2-5) OR ANY HIRE VEHICLE IN THE LAST 6 MONTHS (Q9A OR B=2-5) THEN SKIP TO Q64

SHOW IF USED TAXI IN LAST 6 MONTHS (Q6=1) BUT NOT ANY HIRE VEHICLE (Q9A OR B=2-5)

Please now think about just your **very last trip** in a **taxi**.

SHOW IF USED A RIDESHARE IN LAST 6 MONTHS (Q9A=1) BUT NOT LIMOUSINE OR OTHER HIRE VEHICLE SERVICE (Q9B=2-5) OR A TAXI (Q6=2-5)

Please now think about just your **very last trip** using **a rideshare** service.

SHOW IF USED A LIMOUSINE OR OTHER HIRE VEHICLE SERVICE IN LAST 6 MONTHS (Q9B=1) BUT NOT RIDESHARE (Q9A=2-5) OR A TAXI (Q6=2-5)

Please now think about just your **very last trip** using a **limousine or other hire vehicle service**.

ASK IF USED BOTH RIDESHARE (Q9A=1) AND A LIMOUSINE OR OTHER HIRE VEHICLE SERVICE (Q9B=1) IN LAST 6 MONTHS BUT NOT A TAXI (Q6=2-5)

35. Please think now about just your **very last** trip. Was that last trip using:
    (1) A **rideshare** service
    (2) A **limousine** or **other hire vehicle**

ASK IF USED BOTH TAXIS (Q6=1) AND ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

ONLY SHOW CODE 2 IF Q9A=1 / ONLY SHOW CODE 3 IF Q9B=1

36. Was your very last trip :
    (1) Using a **taxi**
    (2) Using a **rideshare** service
    (3) Using a **limousine** or **other hire vehicle service**

ASK IF LAST TRIP WAS A RIDESHARE [Q36 = 2] of ONLY USED RIDESHARE

36A. Did you use a 'pooled' rideshare facility for that last trip (ie: where you share the costs with someone else who is doing a similar trip at the same time)?
    (1) Yes
    (2) No
    (3) Unsure / can't recall

37. Which of these best describes the type of place **where** you were picked up and dropped off for that very last trip?

	Pick up location SINGLE RESPONSE	**Drop off location** SINGLE RESPONSE
A private home or apartment	☐1	☐1
A workplace or office	☐2	☐2
A shop or shopping centre	☐3	☐3
A pub, club or other similar type of location	☐4	☐4
In a CBD, town centre or other busy area	☐5	☐5
At an event	☐6	☐6
At an airport	☐7	☐7
At a train station or other transport connection	☐8	☐8
Hospital or medical facility	☐9	☐9
Somewhere else: Please describe __________	☐10	☐10

38. What **day and time** were you picked up? *Please select ONE time period only. Note that after midnight is the morning of the following day*

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Early morning - midday	☐12	☐22	☐32	☐42	☐52	☐62	☐72
Midday-6pm	☐13	☐23	☐33	☐43	☐53	☐63	☐73
6pm-10pm	☐14	☐24	☐34	☐44	☐54	☐64	☐74
10pm-midnight	☐15	☐25	☐35	☐45	☐55	☐65	☐75
After midnight	☐21	☐31	☐41	☐51	☐61	☐71	☐11

Peak weekend period

39. What was your **main purpose** in taking your most recent trip?

SINGLE RESPONSE

(1) Work-related (including getting home from work)
(2) Getting to or from appointments
(3) Getting to or from the shops
(4) Socialising or recreation (including getting back home)
(5) Moving items from one place to another
(6) For education purposes
(7) Something else

40. What were the reasons you used a [INSERT TEXT: **"taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service"**] for this journey instead of other transport options or driving yourself?

	Main reason SINGLE RESPONSE	**Other reasons** MULTIPLE RESPONSE
Quicker to get / shorter waiting time	☐1	☐1
Quicker or more direct travel time	☐2	☐2
More convenient than driving (for example, I didn't have to worry about parking, I had luggage, it was raining and I didn't want to get wet, I was drinking)	☐3	☐3
More convenient than other paid transport options I could have used	☐4	☐4
Cheaper than alternatives	☐5	☐5
More reliable than alternatives	☐6	☐6
Makes different types of vehicle (like a van, ute or luxury car) available	☐7	☐7
I didn't have access to any other transport options	☐8	☐8
It's what I am most comfortable or familiar using	☐9	☐9
It was a good option to use given the COVID conditions at the time	☐11	☐11
Another reason: Please describe ____________	☐10	☐10

41. How was the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine** or **other hire vehicle service**"] organised for that trip?

IF TAXI SHOW ALL CODES EXCEPT 4 / IF ANY TYPE OF HIRE VEHICLE DO NOT SHOW CODES 1-3

(1) At a taxi rank
(2) Hailed/waved down on the street
(3) Phoned a taxi company
(4) By calling a phone number
(5) By internet booking
(6) Contacted a driver directly
(7) Had a regular booking
(8) Used a smartphone application (app)
(9) Some other way
(10) I'm not sure because someone else organised it

ASK IF CAUGHT FROM RANK (Q41=1) or HAILED (Q41=2)

42. Do you recall the name of the taxi company whose car you caught?

(1) Yes: *Please specify* ________________
(2) I think so: *Please specify* ________________
(3) No

ASK IF CAUGHT FROM RANK (Q41=1) or HAILED (Q41=2)

43. When you thought about catching the taxi, did you…
    (1) Consider calling or booking a taxi or other type of vehicle instead
    (2) **Not** consider calling or booking a taxi or other type of vehicle.

ASK IF CONSIDERED BOOKING BUT DID NOT (q43=1)

44. Given you considered booking a taxi (or other type of vehicle) but instead [INSERT IF Q41=1 "got a taxi at a rank" OR IF Q41=2 "hailed a taxi on the street"], was that because… *please select all that apply*

MULTIPLE RESPONSE

    (1) You did not want to pay a booking fee
    (2) You didn't think a booked taxi would arrive any faster
    (3) You didn't have access to a phone or the internet to make a booking
    (4) You didn't know how to book a taxi or other vehicle
    (5) You wanted to be anonymous
    (6) There was a taxi immediately available [INSERT IF Q41=1 "at the rank" OR IF Q41=2 "to be hailed on the street"]
    (7) Something else: *Please specify* ________

ASK IF USED SOME FORM OF BOOKING SERVICE OR APP (Q41=3,4,5,8)

45. Do you recall the

INSERT IF Q41=3 "name of the taxi company you called?"

INSERT IF Q41=4 "phone number or the name of the phone service you called?"

INSERT IF Q41=5 "website you used?"

INSERT IF Q41=8 "smartphone application (app) you used?"

    (1) Yes: *Please specify* _________________
    (2) I think so: *Please specify* _________________
    (3) No

ASK IF CAUGHT FROM RANK (Q41=1)

46. How long did you have to wait at the rank?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (5) More than 40 minutes
    (6) Can't recall

ASK IF CAUGHT BY HAILING (Q41=2)

47. How long did you have to wait to hail a taxi?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (7) More than 40 minutes
    (8) Can't recall

ASK IF BOOKED (Q41=3, 4, 5, 6, 8)

48. Did you ask for a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"]:
    (1) As soon as possible / the next available
    (2) For a particular time

ASK IF BOOKED NEXT AVAILABLE VEHICLE (Q48=1)

49. Were you given an estimate of the waiting time till the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"] would arrive?
    (1) Yes
    (2) No
    (3) Can't recall

ASK IF BOOKED NEXT AVAILABLE VEHICLE (Q48=1)

50. How long did you have to wait for the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"] after you booked it?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (5) More than 40 minutes
    (6) Can't recall

ASK IF UNSURE OR OTHER METHOD OF GETTING VEHICLE (Q41=9-10)

51. How long did you have to wait for the [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle**"]?
    (1) Less than 5 minutes
    (2) 5 to less than 10 minutes
    (3) 10 to less than 20 minutes
    (4) 20 to less than 40 minutes
    (5) More than 40 minutes
    (6) Can't recall

ASK IF REGULAR BOOKING (Q41=7) OR PREBOOKED (Q48=2)

52. How long, if at all, did you have to wait for the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"] after your booked time?
    - **(0) It was early or on-time**
    - (1) Less than 5 minutes
    - (2) 5 to less than 10 minutes
    - (3) 10 to less than 20 minutes
    - (4) 20 to less than 40 minutes
    - (5) More than 40 minutes
    - (6) Can't recall

ASK IF GIVEN A WAITING TIME ESTIMATE (q49=1)

53. How accurate was the estimate of your waiting time?
    - (1) It came **much sooner** than estimated
    - (2) It came **a little sooner** than estimated
    - (3) It was **very close**
    - (4) It took **a little longer** than estimated
    - (5) It took **much longer** than estimated

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

54. How satisfied or dissatisfied were you with how long you had to wait to use the [INSERT TEXT: "**taxi"** OR **"rideshare service"** OR **"limousine or other hire vehicle service**"]?
    - (1) Very dissatisfied
    - (2) Dissatisfied
    - (3) Slightly dissatisfied
    - (4) Slightly satisfied
    - (5) Satisfied
    - (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

55. Approximately how long do you think your last trip was?
    - (1) Less than 5 km
    - (2) 5 km to under 10 km
    - (3) 10 km to under 15 km
    - (4) 15 km to under 25 km
    - (5) 25 km to under 50 km
    - (6) 50 km or more

ASK IF LAST TRIP IN RIDESHARE OR LIMOUSINE OR OTHER OF HIRE VEHICLE

56. Before you booked the trip, did you compare prices for different hire vehicles?
    (1) Yes – on the internet or using apps
    (2) Yes – by phoning around
    (3) Yes – in some other way
    (4) No

ASK IF DID NOT COMAPRE PRICES (Q56=4)

57. Why did you not compare prices before you booked the trip?

MULTIPLE RESPONSE
    (1) I always use that provider or service
    (2) I was happy with the price estimate I was given
    (3) Some other reason

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

58. While you were making the booking, were you given a fare estimate?
    (1) Yes
    (2) No
    (3) Can't recall

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

59. Including any service fee for electronic payment and any other charges, what was the cost of your last trip? *Please enter your **best estimate** of the total cost to the nearest dollar*
    $_____
    (1) I'm not sure because someone else paid
    (2) Can't recall

ASK IF LAST TRIP IN ANY TYPE OF HIRE VEHICLE AND GIVEN A FARE ESTIMATE (q58=1)

60. How accurate did you find the fare estimate to be? Was the actual fare you paid…
    (1) **Much less** than the estimate
    (2) **A little less** than the estimate
    (3) **Very close** to the estimate
    (4) **A little more** than the estimate
    (5) **Much more** than the estimate

ASK ALL IF AWARE OF COST OF LAST TRIP [Q59=1-8]

61. How satisfied or dissatisfied were you with the amount you paid for the trip?
    (1) Very dissatisfied
    (2) Dissatisfied
    (3) Slightly dissatisfied
    (4) Slightly satisfied
    (5) Satisfied
    (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

62. Thinking about all aspects of your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"], how satisfied or dissatisfied were you with the overall experience?
    (1) Very dissatisfied
    (2) Dissatisfied
    (3) Slightly dissatisfied
    (4) Slightly satisfied
    (5) Satisfied
    (6) Very Satisfied

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

These next few questions about your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"] are specifically in relation to COVID.

62A. Given the COVID conditions at the time, on your last trip in a [INSERT TEXT: "**taxi**" OR "**rideshare service**" OR "**limousine or other hire vehicle service**"], how confident were you using this type of transport?
    (1) Totally confident
    (2) Very confident
    (3) Somewhat confident
    (4) Not very confident
    (5) Not at all confident

62B. From a COVID perspective, for that last trip how well did you consider:

		Good	Acceptable	Unacceptable
A	The vehicle to have been cleaned and sanitised	1	2	3
B	Social distancing to be maintained	1	2	3

62C. On that last trip in a [INSERT TEXT: “**taxi”** OR **“rideshare service”** OR **“limousine or other hire vehicle service**”], did:

		Yes	No	Not applicable
A	The driver wear a mask	1	2	
B	You wear a mask	1	2	
C	All other passengers wear a mask	1	2	3

ASK IF DRIVER DID NOT WEAR A MASK [q62A = CODE 2]

62D. You said that the driver did not wear a mask on that last trip. Would you have liked them to have worn a mask?

(1) Yes, I think drivers should always wear a mask
(2) Yes, I prefer for drivers to wear a mask
(3) I don’t mind either way
(4) No, I prefer drivers not to wear a mask

ASK ALL IF USED TAXIS (Q6=1) OR ANY HIRE VEHICLES (Q9A OR B=1) IN LAST SIX MONTHS

63. And what impact, if any, did your last trip in a [INSERT TEXT: “**taxi”** OR **“rideshare service”** OR **“limousine or other hire vehicle service** ”] have on how likely you are to use that service again?

(1) Made you **much less** likely to use it again
(2) Made you a **little less** likely to use it again
(3) Had **no impact**
(4) Made you a **little more** likely to use it again
(5) Made you **much more** likely to use it again

PART 6: PERCEIVED STRENGTHS AND WEAKNESSES OF SERVICES

ASK Q64 FOR ALL FOR SERVICES AWARE OF [Q5=1, Q8A=1, Q8B=1]

64. Do you personally think that each of the following is a strength (✓), weakness (✗) or neutral (○) characteristic of the different types of transport options? *If you don't have any experience or opinion, please tell us what you think is most likely the case.*

REQUIRES ONE ANSWER FOR EACH TYPE OF TRANSPORT PER ROW

	RANDOMISE ORDER	Taxis			Rideshare			Limousines or other hire vehicle services		
		✓	○	✗	✓	○	✗	✓	○	✗
A	Safety	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
B	Value for money	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
C	Availability	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
D	Waiting times	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
E	Vehicle quality	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
F	Navigation and route knowledge	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
G	Driver presentation and attitude	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
H	Driving skills	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
I	Customer service	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
J	Convenience	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
K	Hygiene during COVID	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

65. Overall, do you have a preference for using:
   (1) **Taxis**
   (2) Hire vehicles - **Rideshare, Limousines** or **other hire vehicle services**
   (3) No preference
   (4) Prefer not to use any of these

ASK IF PREFERENCE FOR HIRE VEHICLES [Q65=2]

66. Do you have a preference for:
   (1) **Rideshare** services (eg: Uber, Shebah, Ola, Didi)
   (2) **Limousines** or **other hire vehicle services**
   (3) Both equally

ASK IF HAVE A PREFERENCE FOR TAXIS [Q65=1] OR HIRE VEHICLES [Q65=2]

67. How strong is your preference for using [INSERT TEXT: “**taxis”** OR **“rideshare services”** OR **“limousine** or **other hire vehicle services**” OR “**any type of hire vehicles**”]? Would you say…
    (1) You would **only** use them
    (2) You **strongly** prefer to use them
    (3) You have only a **slight** preference for using them

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

68. In the next 12 months, what is the thing that is <u>most likely</u> to get you to use different types of transport more regularly?

SINGLE RESPONSE PER **COLUMN**

	A	B	C
	Taxis	**Rideshare services**	**Limousines or other hire vehicle services**
If fares get cheaper	1	1	1
If there is no peak or surge pricing	2	2	2
If more services become available in my area	3	3	3
If there is a shorter time to wait to get one	4	4	4
If booking services improve	5	5	5
If driver quality improves	6	6	6
If vehicle hygiene or cleanliness was improved	8	8	8
None of these improvements would make me use them more regularly	7	7	7

PART 7: CONTEXT

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

70. Are you aware of any of these **rules or regulations** that currently apply to using types of point-to-point transport? MULTIPLE RESPONSE EXCEPT CODE 5
    (1) Booked trips in **taxis** are not subject to maximum fare regulation
    (2) All providers of booked trips in **taxis** or **hire vehicles** have to give a fare estimate before starting a trip
    (3) Rank and hail **taxi** trips remain subject to maximum fares set by the Government
    (4) Rank and hail trips can only be undertaken by **taxis**
    (5) None of these

ORIMA

69. The NSW Government has recently announced that it will shortly stop regulating the number of taxi licences and taxi fares. Prior to doing this survey, were you aware that the NSW Government was intending to make these changes?
    (1) Yes
    (2) I had heard there will be changes, but not aware exactly what they were
    (3) Was not aware that there will be changes.

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

77. Overall, what has been the impact of the COVID 19 pandemic on your level of use of these services, and how confident you would feel to use them:

	Taxis			Rideshare			Limousines or other hire vehicle services		
	Higher	Same	Lower	Higher	Same	Lower	Higher	Same	Lower
Your **use** of:	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9
How **confident** you would feel to use:	☐1	☐2	☐3	☐4	☐5	☐6	☐7	☐8	☐9

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

79a. Thinking about **taxis** generally, have you seen or heard anything lately that made you feel:
[MULTIPLE RESPONSE]
    (1) More positively about using taxis
        If yes, please specify ___________________________________
    (2) Less positively about using taxis
        If yes, please specify ___________________________________
    (3) Neither

79b. And thinking about **rideshare** generally, have you seen or heard anything lately that made you feel:
[MULTIPLE RESPONSE]
    (1) More positively about using rideshare
        If yes, please specify ___________________________________
    (2) Less positively about using rideshare
        If yes, please specify ___________________________________
    (3) Neither

PART 8: OTHER DEMOGRAPHICS

ASK ALL / INCLUDING THOSE UNAWARE OR DO NOT USE TRANSPORT SERVICES

73. Would you mind telling us your approximate household annual income from all sources before tax, bearing in mind that this information will remain strictly confidential and that ORIMA Research and its client have no way of identifying you? Just click on the answer below you believe comes closest, even if you are not completely sure.

(4) Under $20,000
(5) $20,000 to under $30,000
(6) $30,000 to under $40,000
(7) $40,000 to under $50,000
(8) $50,000 to under $60,000
(9) $60,000 to under $80,000
(10)$80,000 to under $100,000
(11)$100,000 to under $120,000
(12)$120,000 to under $180,000
(13)$180,000 or more
(14)Can't say
(15)Prefer not to say

74. Do you have a physical disability

SINGLE RESPONSE

(1) Yes
(2) No
(3) Prefer not to say

ASK IF HAVE DISABILITY (Q74=1)

75. Can you:

SINGLE RESPONSE

(1) Catch any type of taxi or rideshare
(2) Only use a wheelchair accessible taxi or rideshare
(3) Can’t say
(4) Prefer not to say

ASK IF HAVE A DISABILITY (Q74=1) AND HAVE USED TAXIS OR RIDESHARE IN LAST 12 MONTHS (Q6=1-2 OR Q9a=1-2)

75a. In the last 12 months, how often have you used wheelchair accessible taxis or rideshare?

(1) Always
(2) Most times
(3) Sometimes
(4) Rarely
(5) Never

ASK IF HAVE USED WHEELCHAIR ACCESSIBLE P2P TRANSPORT IN LAST 12 MONTHS (Q75=1-4)

75b. When you have used wheelchair accessible taxis or rideshare in the last 12 months, how often – if at all – have you transferred to a seat in the vehicle?

(1) Always
(2) Most times
(3) Sometimes
(4) Rarely
(5) Never

ASK IF HAVE DISABILITY (74=1)

76. Do you get payment assistance for taxis from:

CODES 1 AND 2 ARE MULTIPLE RESPONSE

(1) Taxi Transport Subsidy Scheme
(2) Department of Veteran Affairs
(3) Other (please specify: __________)
(4) None of these

CLOSE

Thank you for taking the time to answer this survey. The survey is being conducted by ORIMA Research and the ORU on behalf of the NSW Government's Independent Pricing and Regulatory Tribunal.

Please click on SUBMIT below to submit your survey answers and ensure you receive your incentive.

Appendix B: Sample Demographics

Targets

The table below shows the 2023 sample demographics versus quotas based on ABS population data. The 2023 survey sample was weighted to match the original 2017 weighted sample, to maximise consistency of the year-by-year comparisons.

Quotas (based on population)

Sydney	Male	Female	Total
16-29	12%	14%	27%
30-39	10%	9%	19%
40-49	9%	9%	18%
50-59	7%	8%	15%
60-69	6%	6%	11%
70+	5%	5%	10%
Total	49%	51%	100%

Reg City	Male	Female	Total
16-29	6%	12%	18%
30-39	6%	9%	15%
40-49	9%	10%	19%
50-59	8%	10%	18%
60-69	7%	7%	15%
70+	7%	9%	16%
Total	44%	56%	100%

Rest NSW	Male	Female	Total
16-29	10%	10%	20%
30-39	7%	8%	15%
40-49	8%	10%	18%
50-59	8%	9%	17%
60-69	8%	8%	16%
70+	7%	8%	15%
Total	48%	52%	100%

Actual 2023 sample

Sydney	Male	Female	Total
16-29	10%	11%	21%
30-39	8%	9%	17%
40-49	8%	7%	15%
50-59	7%	7%	15%
60-69	8%	8%	16%
70+	8%	8%	16%
Total	50%	50%	100%

Reg City	Male	Female	Total
16-29	11%	9%	20%
30-39	8%	9%	18%
40-49	7%	8%	15%
50-59	7%	8%	15%
60-69	8%	8%	16%
70+	7%	8%	15%
Total	49%	51%	100%

Rest NSW	Male	Female	Total
16-29	3%	8%	12%
30-39	6%	7%	14%
40-49	6%	10%	16%
50-59	10%	9%	19%
60-69	13%	9%	21%
70+	11%	7%	18%
Total	49%	51%	100%

Difference

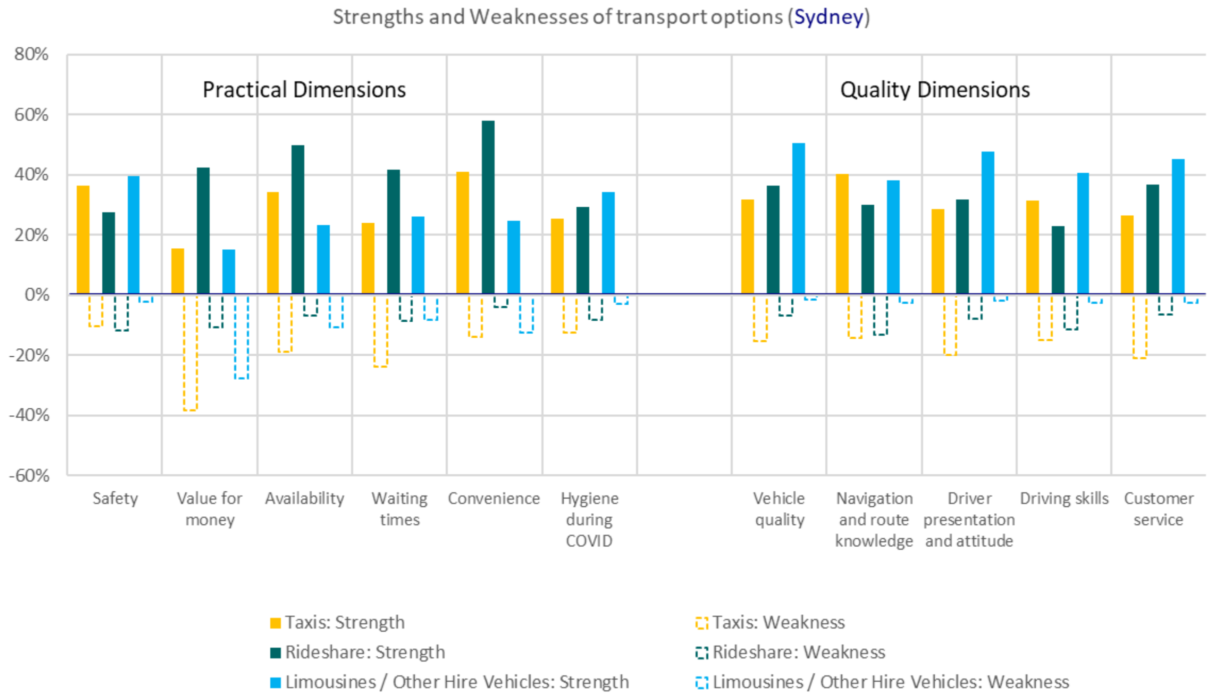
Sydney	Male	Female	Total
16-29	-2%	-3%	-5%
30-39	-1%	0%	-2%
40-49	-1%	-2%	-3%
50-59	0%	0%	-1%
60-69	2%	2%	4%
70+	4%	3%	6%
Total	1%	-1%	0%

Reg City	Male	Female	Total
16-29	5%	-2%	2%
30-39	2%	1%	3%
40-49	-2%	-2%	-3%
50-59	-1%	-1%	-2%
60-69	1%	1%	1%
70+	0%	-1%	-1%
Total	5%	-5%	0%

Rest NSW	Male	Female	Total
16-29	-6%	-2%	-8%
30-39	0%	0%	-1%
40-49	-2%	0%	-2%
50-59	1%	1%	2%
60-69	5%	1%	6%
70+	4%	-1%	3%
Total	1%	-1%	0%

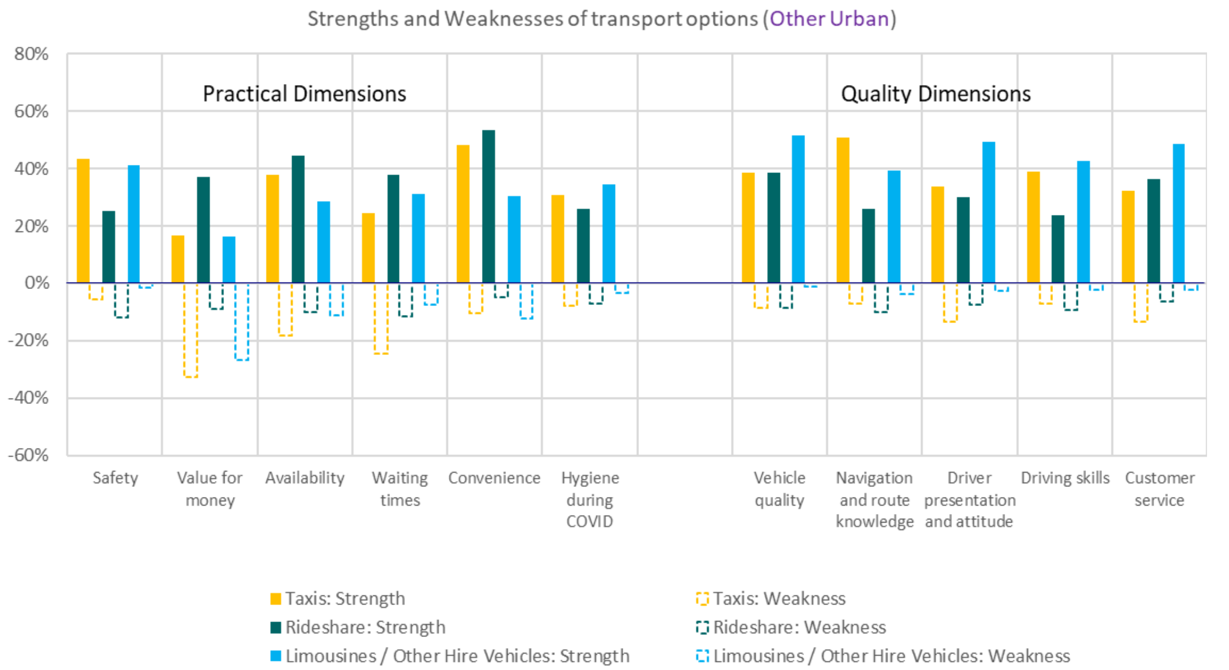
Appendix C: Detailed Strengths and Weaknesses

Figure 100: Detailed strengths and weaknesses of transport options - Sydney Q64



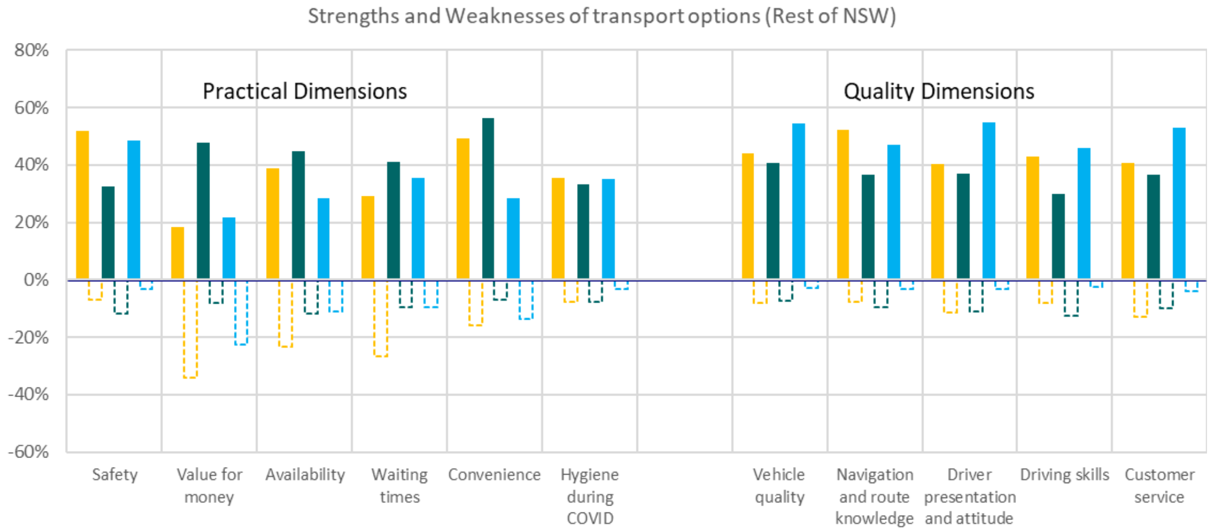
Base = Respondents aware of service in location [Taxis n=1,989; Rideshare n=1,927; Limo / Other n=1,588]

Figure 101: Detailed strengths and weaknesses of transport options - Other Urban Q64



Base = Respondents aware of service in location [Taxis n=498; Rideshare n=439; Limo / Other n=373
]

Figure 102: Strengths and weaknesses of transport options - Rest of NSW Q64



Base = Respondents aware of service in location [Taxis n=384; Rideshare n=214; Limo / Other n=206]

Appendix D: Demographic Comparisons

Demographic breakdowns for the 2023 survey are provided in a separate interactive electronic format.

Appendix E: Tracking Chart Data

This section shows the data underlying each of the tracking charts throughout the report.

Figure numbers shown in the captions relate to the position of the tracking chart in the main body of the report.

Figure 2: Change in awareness of point-to-point transport services in their location Q5/8/11

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	98%	89%	82%	97%	59%	75%	92%	29%	45%
2018	98%	94%	83%	98%	77%	81%	92%	43%	52%
2019	97%	94%	78%	95%	80%	76%	93%	44%	51%
2020	97%	94%	78%	94%	82%	71%	91%	50%	48%
2022	97%	94%	77%	93%	80%	70%	91%	50%	47%
2023	98%	95%	76%	94%	83%	71%	92%	54%	49%

Figure 4: Change in usage of point-to-point transport services in the last 6 months among all respondents Q6/9

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	51%	36%	11%	35%	10%	8%	32%	8%	4%
2018	52%	48%	13%	37%	28%	13%	29%	15%	5%
2019	49%	51%	10%	35%	29%	10%	34%	14%	6%
2020	31%	44%	5%	23%	24%	4%	21%	12%	3%
2022	35%	46%	7%	21%	25%	5%	20%	15%	5%
2023	44%	55%	9%	28%	30%	8%	36%	19%	5%

Figure 7: Change in frequency of using point-to-point transport services among service users Q13

Base = used in the last 6 months

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
		weekly			*monthly*	
2017	13%	18%	16%	52%	69%	38%
2018	15%	20%	12%	51%	68%	35%
2019	15%	21%	14%	51%	66%	41%
2020	14%	19%	27%	50%	66%	48%
2022	18%	19%	18%	50%	67%	46%
2023	14%	19%	13%	48%	65%	33%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
		weekly			*monthly*	
2017	11%	16%	5%	53%	65%	32%
2018	8%	13%	2%	42%	59%	25%
2019	9%	17%	9%	41%	62%	26%
2020	9%	20%	22%	39%	59%	61%
2022	6%	10%	0%	38%	57%	8%
2023	7%	8%	5%	48%	55%	22%

	Rest of NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
		weekly			*monthly*	
2017	16%	19%	17%	48%	72%	33%
2018	5%	14%	0%	40%	62%	8%
2019	13%	13%	8%	53%	60%	58%
2020	10%	18%	18%	46%	49%	41%
2022	6%	11%	34%	48%	49%	61%
2023	9%	11%	4%	43%	55%	11%

Figure 9: Rate of change in use of transport services in the last 12 months amongst those who have ever used transport services. Q16
Table shows nett differential (i.e.: % reported an increase in use minus the proportion who reported a decrease in use)

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2016*	-9%	8%		-8%	2%		-8%	3%	
2017	-26%	26%	-10%	-19%	28%	-6%	-12%	21%	-12%
2018	-27%	29%	-28%	-26%	34%	-17%	-15%	20%	-25%
2019	-26%	23%	-28%	-27%	20%	-24%	-20%	1%	-45%
2020	-45%	-18%	-42%	-34%	-21%	-42%	-28%	-21%	-39%
2022	-33%	-16%	-42%	-33%	-17%	-47%	-23%	-16%	-43%
2023	-21%	1%	-29%	-26%	-10%	-27%	-20%	-6%	-24%

Figure 13: Changes in reported Impact of using hire vehicles on the use of taxis amongst users of both services Q17

	Sydney		Other urban		Other NSW	
	Use taxis a lot less often	Use taxis less often	Use taxis a lot less often	Use taxis less often	Use taxis a lot less often	Use taxis less often
2017	54%	78%	49%	66%	42%	63%
2018	53%	78%	54%	66%	54%	74%
2019	54%	78%	53%	80%	53%	76%
2020	65%	84%	58%	79%	67%	77%
2022	59%	80%	53%	75%	58%	70%
2023	60%	79%	56%	75%	55%	74%

Figure 15: Change in prevalence of having tried to use transport options and not been able to within the last 6 months *(base = aware of service in location)* Q14

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	15%	11%	5%	9%	5%	2%	11%	16%	3%
2018	16%	13%	4%	12%	11%	3%	11%	15%	4%
2019	17%	15%	6%	13%	14%	4%	10%	19%	4%
2020	12%	12%	4%	10%	13%	4%	9%	16%	3%
2022	14%	18%	5%	11%	17%	3%	11%	19%	8%
2023	19%	24%	4%	13%	18%	4%	18%	23%	6%

Figure 18: Change in success rate for last attempt among users who could recall the outcome
(base = used transport in the last 12 months AND excludes 'can't recall outcome' responses) Q30

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	77%	92%	91%	83%	95%	94%	77%	88%	94%
2018	78%	93%	92%	81%	93%	96%	87%	95%	100%
2019	78%	91%	86%	80%	93%	96%	81%	91%	87%
2020	74%	93%	89%	74%	92%	86%	86%	93%	100%
2022	75%	88%	82%	82%	90%	97%	84%	86%	87%
2023	77%	88%	87%	75%	87%	92%	76%	88%	87%

Figure 21: Change in experiencing ANY problem using point-to-point transport amongst users Q28

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2013	40%	-	-	-	-	-	-	-	-
2014	35%	-	-	27%	-	-	26%	-	-
2015	36%	-	-	24%	-	-	24%	-	-
2016	37%	27%	-	26%	22%	-	27%	22%	-
2017	62%	46%	25%	40%	34%	15%	45%	40%	18%
2018	65%	49%	26%	55%	37%	10%	48%	49%	17%
2019	59%	51%	30%	51%	45%	23%	54%	54%	36%
2020	64%	50%	34%	52%	49%	24%	49%	45%	34%
2022	63%	57%	35%	53%	56%	34%	50%	63%	46%
2023	68%	61%	36%	56%	57%	21%	56%	59%	23%

Figure 23: Change in satisfaction with point-to-point transport services Q7/10

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	53%	50%	41%	14%	4%	2%
2018	56%	59%	43%	15%	4%	1%
2019	60%	62%	40%	12%	5%	2%
2020	52%	65%	39%	13%	4%	2%
2022	55%	62%	39%	12%	5%	2%
2023	54%	63%	36%	16%	6%	2%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	55%	23%	39%	8%	4%	2%
2018	55%	38%	45%	11%	4%	2%
2019	58%	45%	43%	8%	4%	2%
2020	52%	47%	40%	10%	4%	2%
2022	52%	44%	38%	8%	5%	3%
2023	55%	48%	37%	8%	4%	2%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Satisfied			*Dissatisfied*		
2017	54%	19%	25%	11%	6%	3%
2018	56%	25%	27%	8%	8%	4%
2019	61%	29%	30%	9%	11%	4%
2020	53%	24%	27%	9%	8%	2%
2022	49%	28%	23%	12%	10%	7%
2023	51%	30%	25%	14%	12%	5%

Figure 27: Changes in perceived strengths and weaknesses of transport options amongst those aware of the service in their region (average Practical Dimensions and Quality Dimensions scores) Q64

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	7%	33%	20%	5%	23%	48%
2018	6%	41%	18%	7%	26%	48%
2019	12%	41%	16%	16%	24%	45%
2020	7%	42%	12%	11%	23%	45%
2022	11%	37%	15%	17%	22%	44%
2023	9%	35%	13%	15%	22%	42%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	22%	28%	29%	28%	21%	53%
2018	16%	33%	24%	24%	24%	53%
2019	19%	37%	26%	25%	29%	53%
2020	19%	36%	22%	31%	27%	47%
2022	20%	33%	18%	31%	23%	48%
2023	16%	30%	18%	29%	23%	44%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Practical Dimensions			*Quality Dimensions*		
2017	23%	31%	22%	36%	23%	48%
2018	25%	34%	31%	36%	29%	54%
2019	25%	33%	25%	38%	24%	49%
2020	24%	36%	25%	38%	29%	53%
2022	25%	31%	22%	40%	25%	49%
2023	16%	35%	21%	34%	26%	48%

Figure 29: Changes in preferences for transport options Q65/66

	Sydney			Other urban			Other NSW		
	Taxis	Rideshare	Prefer not to use any	Taxis	Rideshare	Prefer not to use any	Taxis	Rideshare	Prefer not to use any
2017	26%	25%	17%	27%	9%	24%	31%	8%	26%
2018	25%	33%	14%	25%	19%	18%	29%	16%	24%
2019	25%	35%	12%	26%	24%	17%	33%	14%	24%
2020	18%	36%	16%	25%	26%	20%	25%	13%	31%
2022	22%	32%	16%	22%	22%	21%	27%	14%	28%
2023	21%	34%	13%	25%	23%	19%	31%	18%	22%

Figure 41: Change in perceptions of OVERALL value for money amongst those aware of the service in their region Q20

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good + OK			***Poor***		
2017	46%	61%	36%	43%	5%	17%
2018	49%	67%	34%	42%	6%	17%
2019	52%	70%	35%	38%	7%	16%
2020	44%	72%	33%	43%	7%	17%
2022	50%	67%	33%	35%	11%	16%
2023	52%	69%	29%	36%	13%	14%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good + OK			***Poor***		
2017	50%	38%	40%	25%	3%	10%
2018	46%	50%	39%	31%	6%	13%
2019	54%	62%	42%	30%	5%	16%
2020	50%	60%	41%	27%	5%	10%
2022	49%	56%	37%	23%	10%	16%
2023	52%	58%	33%	26%	12%	17%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Good + OK			***Poor***		
2017	46%	50%	33%	28%	6%	13%
2018	51%	56%	32%	27%	4%	13%
2019	53%	59%	38%	28%	7%	15%
2020	46%	53%	30%	30%	8%	19%
2022	52%	61%	44%	21%	6%	14%
2023	51%	56%	31%	30%	14%	17%

Figure 45: A - Changes in prevalence of methods of obtaining transport Q22

Base: All respondents

	2017	2018	2019	2020	2022	2023
Sydney						
Taxis pre-booked	19%	18%	16%	8%	11%	15%
Taxis ASAP booked	23%	24%	19%	13%	14%	17%
Taxis rank	24%	27%	22%	11%	14%	19%
Taxis hail	22%	25%	21%	13%	13%	18%
Rideshare pre-booked	12%	18%	20%	14%	15%	20%
Rideshare ASAP booked	29%	39%	39%	36%	36%	44%
Limo/HV pre-booked	10%	11%	8%	4%	6%	8%
Limo/HV ASAP booked	2%	2%	2%	1%	2%	2%
Other urban						
	2017	2018	2019	2020	2022	2023
Taxis pre-booked	11%	11%	11%	6%	6%	8%
Taxis ASAP booked	20%	22%	21%	15%	15%	17%
Taxis rank	17%	20%	16%	11%	6%	11%
Taxis hail	4%	7%	4%	2%	2%	5%
Rideshare pre-booked	4%	8%	10%	9%	8%	7%
Rideshare ASAP booked	8%	22%	23%	18%	21%	26%
Limo/HV pre-booked	6%	12%	9%	3%	4%	7%
Limo/HV ASAP booked	2%	1%	1%	1%	1%	1%
Other NSW						
	2017	2018	2019	2020	2022	2023
Taxis pre-booked	12%	10%	11%	7%	6%	17%
Taxis ASAP booked	21%	20%	22%	16%	13%	22%
Taxis rank	13%	11%	13%	7%	7%	11%
Taxis hail	3%	2%	5%	1%	3%	4%
Rideshare pre-booked	4%	4%	5%	7%	6%	6%
Rideshare ASAP booked	6%	12%	10%	8%	10%	15%
Limo/HV pre-booked	3%	4%	5%	3%	2%	3%
Limo/HV ASAP booked	2%	1%	1%	1%	3%	1%

B - Changes in prevalence of methods of obtaining transport Q22

Base: users of each service

	Sydney					
	2017	2018	2019	2020	2022	2023
Taxis pre-booked	37%	35%	32%	28%	31%	33%
Taxis ASAP booked	45%	46%	39%	41%	41%	38%
Taxis rank	47%	52%	44%	37%	40%	43%
Taxis hail	43%	48%	42%	43%	38%	41%
Rideshare pre-booked	32%	37%	39%	33%	33%	36%
Rideshare ASAP booked	80%	82%	77%	81%	79%	80%
Limo/HV pre-booked	83%	86%	83%	83%	79%	84%
Limo/HV ASAP booked	20%	19%	23%	19%	23%	20%
	Other urban					
	2017	2018	2019	2020	2022	2023
Taxis pre-booked	31%	30%	31%	27%	30%	28%
Taxis ASAP booked	57%	60%	61%	64%	70%	61%
Taxis rank	49%	53%	46%	47%	30%	39%
Taxis hail	11%	19%	13%	8%	12%	19%
Rideshare pre-booked	43%	29%	33%	38%	32%	22%
Rideshare ASAP booked	75%	81%	80%	77%	84%	87%
Limo/HV pre-booked	82%	94%	89%	78%	84%	88%
Limo/HV ASAP booked	21%	11%	11%	27%	26%	14%
	Other NSW					
	2017	2018	2019	2020	2022	2023
Taxis pre-booked	36%	33%	33%	35%	33%	47%
Taxis ASAP booked	66%	67%	64%	77%	68%	62%
Taxis rank	42%	36%	39%	33%	36%	31%
Taxis hail	8%	7%	14%	6%	18%	12%
Rideshare pre-booked	44%	30%	34%	57%	41%	32%
Rideshare ASAP booked	72%	82%	74%	69%	71%	78%
Limo/HV pre-booked	72%	76%	86%	77%	39%	73%
Limo/HV ASAP booked	56%	24%	18%	23%	61%	27%

Figure 52: Change over time in employer behaviours towards paying for transport in last 12 months amongst those employed and whose employer at least sometimes pays for the use of point-to-point transport Q33

	Sydney				Other urban				Other NSW			
	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use	Taxis - Allow more use	Any Hire Vehicle - Allow more use	Taxis - Require less use	Any Hire Vehicle - Require less use
2017	10%	28%	17%	14%	8%	37%	21%	8%	17%	33%	14%	22%
2018	15%	39%	15%	9%	13%	34%	11%	6%	9%	27%	14%	6%
2019	16%	35%	19%	12%	12%	44%	14%	7%	24%	39%	19%	21%
2020	10%	20%	18%	16%	6%	18%	21%	26%	16%	29%	24%	17%
2022	14%	22%	16%	14%	18%	20%	14%	17%	23%	30%	14%	11%
2023	15%	26%	16%	11%	16%	18%	11%	13%	16%	30%	16%	2%

Figure 55: Changes in usage of vehicle types for last trip (base = used transport in last 6 months) [QX]

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	56%	39%	6%	73%	18%	10%	79%	16%	5%
2018	45%	50%	6%	52%	36%	12%	61%	30%	9%
2019	42%	54%	5%	46%	46%	8%	70%	25%	5%
2020	30%	67%	2%	46%	52%	3%	64%	30%	5%
2022	36%	62%	2%	38%	56%	7%	58%	37%	5%
2023	33%	64%	3%	40%	49%	10%	64%	34%	2%

Figure 56: Usage of 'pooled' rideshare facility for last trip (base = used rideshare for last trip) [Q36a]

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	-	-	-	-	-	-	-	-	-
2018	-	16%	-	-	18%	-	-	28%	-
2019	-	19%	-	-	11%	-	-	17%	-
2020	-	11%	-	-	16%	-	-	42%	-
2022	-	9%	-	-	15%	-	-	10%	-
2023	-	12%	-	-	16%	-	-	18%	-

Figure 58: Last trip – Change in proportion of Last Trips after 10pm [Q38]

	Sydney				Other urban				Other NSW			
	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs	Taxis - After 10pm Fri-Sat	Rideshare - After 10pm Fri-Sat	Taxis - After 10pm Sun-Thurs	Rideshare - After 10pm Sun-Thurs
2017	9%	17%	9%	7%	14%	16%	4%	5%	13%	27%	-	-
2018	8%	18%	6%	6%	14%	22%	4%	16%	16%	19%	-	-
2019	8%	14%	7%	7%	11%	24%	9%	9%	16%	38%	-	-
2020	10%	16%	11%	7%	17%	18%	6%	6%	22%	20%	-	-
2021	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	-
2023	9%	15%	10%	7%	14%	24%	6%	7%	22%	23%	-	-

Figure 63: Last trip – Changes in method of obtaining vehicle Q41

	Sydney				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2012	33%	34%	23%	4%	1%
2013	30%	33%	25%	4%	2%
2014	29%	32%	23%	6%	3%
2015	30%	29%	25%	8%	3%
2016	31%	26%	25%	8%	3%
2017	34%	22%	25%	8%	4%
2018	34%	21%	24%	8%	4%
2019	33%	21%	21%	11%	5%
2020	22%	27%	22%	14%	3%
2022	27%	20%	21%	13%	9%
2023	29%	19%	19%	16%	7%

	Other urban				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2014	32%	11%	47%	3%	0%
2015	33%	10%	44%	3%	2%
2016	32%	6%	47%	5%	2%
2017	33%	5%	52%	4%	2%
2018	37%	3%	51%	4%	3%
2019	36%	5%	41%	11%	1%
2020	31%	3%	41%	13%	2%
2022	15%	2%	54%	12%	13%
2023	33%	6%	37%	10%	4%

	Other NSW				
	Taxi - Rank	Taxi - Hail	Taxi - Phone	Taxi - internet	Taxi - App
2014	27%	3%	62%	1%	1%
2015	29%	0%	64%	0%	0%
2016	20%	2%	71%	1%	0%
2017	22%	2%	66%	2%	2%
2018	26%	4%	61%	3%	0%
2019	20%	5%	66%	4%	2%
2020	22%	2%	58%	0%	12%
2022	22%	5%	54%	7%	7%
2023	12%	3%	69%	9%	2%

Figure 66: Last trip – Changes in type of booking Q48

	Sydney				Other urban				Other NSW			
	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked	Taxis - ASAP	Rideshare - ASAP	Taxis - Pre-booked	Rideshare - Pre-booked
2017	53%	88%	47%	12%	82%	88%	18%	12%	73%	92%	27%	8%
2018	58%	89%	42%	11%	67%	84%	33%	16%	74%	82%	26%	18%
2019	55%	88%	45%	12%	69%	89%	31%	11%	70%	87%	30%	13%
2020	62%	92%	38%	8%	73%	87%	27%	13%	85%	93%	15%	7%
2022	61%	92%	39%	8%	72%	84%	28%	16%	78%	87%	22%	13%
2023	57%	90%	43%	10%	68%	94%	32%	6%	72%	86%	28%	14%

Figure 71: Changes in overall waiting times across all methods of obtaining a vehicle Q46/47/50/51/52

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	56%	49%	73%	82%	89%	82%
2018	55%	46%	78%	82%	88%	89%
2019	55%	49%	75%	82%	89%	85%
2020	52%	48%	51%	77%	84%	61%
2022	50%	36%	64%	78%	81%	83%
2023	50%	42%	74%	79%	83%	91%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	48%	32%	90%	81%	81%	95%
2018	53%	48%	84%	76%	88%	87%
2019	46%	42%	61%	81%	90%	78%
2020	52%	31%	89%	88%	74%	100%
2022	40%	24%	68%	73%	77%	86%
2023	48%	20%	74%	73%	61%	79%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than 5 minutes			*Within 10 minutes*		
2017	39%	46%	63%	71%	81%	75%
2018	34%	38%	73%	71%	75%	81%
2019	40%	23%	43%	78%	81%	53%
2020	23%	31%	55%	68%	58%	67%
2022	29%	15%	47%	66%	55%	70%
2023	33%	31%	100%	53%	68%	100%

Figure 77: Last trip – Changes in satisfaction with waiting time Q54

	Sydney			Other urban			Other NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2013	73%	-	-	-	-	-	-	-	-
2014	74%	-	-	78%	-	-	89%	-	-
2015	73%	-	-	75%	-	-	75%	-	-
2016	68%	80%	0%	80%	88%	-	90%	100%	-
2017	83%	90%	87%	83%	89%	100%	87%	96%	100%
2018	84%	90%	90%	81%	87%	85%	78%	82%	79%
2019	84%	88%	92%	87%	94%	92%	88%	90%	92%
2020	80%	89%	89%	94%	96%	91%	74%	87%	100%
2022	87%	87%	92%	87%	84%	78%	84%	62%	100%
2023	82%	87%	90%	87%	89%	100%	74%	89%	100%

Figure 79: Last trip – Change in fares paid [Excluding 'others paid / can't recall'] Q59

	Sydney					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			*Less than $40*		
2017	25%	49%	3%	64%	83%	12%
2018	22%	43%	2%	54%	78%	4%
2019	24%	43%	8%	58%	75%	16%
2020	25%	50%	0%	62%	85%	0%
2022	13%	34%	0%	56%	73%	0%
2023	18%	30%	0%	48%	67%	4%

	Other urban					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			*Less than $40*		
2017	53%	69%	6%	90%	89%	6%
2018	46%	49%	4%	83%	83%	4%
2019	43%	52%	7%	80%	84%	7%
2020	34%	56%	0%	75%	89%	0%
2022	23%	44%	0%	81%	78%	8%
2023	36%	45%	0%	76%	77%	0%

	Other NSW					
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
	Less than $20			*Less than $40*		
2017	58%	59%	33%	86%	86%	50%
2018	50%	40%	7%	80%	73%	19%
2019	54%	53%	0%	82%	85%	19%
2020	55%	38%	17%	89%	86%	17%
2022	47%	31%	63%	84%	71%	63%
2023	40%	28%	0%	84%	73%	0%

Figure 86: Last trip – Change in satisfaction with fares (if aware of amount) Q61

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2013	50%	0%	0%	0%	0%	0%	0%	0%	0%
2014	50%	0%	0%	60%	0%	0%	66%	0%	0%
2015	53%	0%	0%	55%	0%	0%	57%	0%	0%
2016	59%	81%	0%	69%	83%	0%	66%	88%	0%
2017	61%	89%	81%	69%	92%	88%	74%	100%	100%
2018	61%	88%	94%	63%	88%	84%	61%	84%	94%
2019	71%	85%	97%	68%	90%	85%	66%	64%	100%
2020	61%	84%	90%	68%	91%	100%	56%	91%	100%
2022	70%	80%	87%	65%	86%	56%	76%	70%	100%
2023	69%	82%	90%	66%	79%	65%	71%	84%	76%

Figure 88: Last trip – Change in overall Satisfaction with last trip Q62

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	82%	94%	83%	89%	97%	90%	88%	96%	100%
2018	83%	94%	95%	84%	92%	91%	83%	89%	95%
2019	85%	92%	95%	93%	92%	92%	92%	85%	100%
2020	78%	93%	80%	94%	97%	91%	86%	90%	100%
2022	83%	90%	96%	83%	89%	87%	89%	79%	100%
2023	82%	90%	92%	84%	96%	95%	86%	95%	100%

Figure 95: Last trip – Change in impact on likelihood to re-use the transport service again Q63

	Sydney			Other urban			Rest of NSW		
	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV	Taxi	Rideshare	Limo/HV
2017	6%	51%	39%	11%	76%	40%	17%	58%	100%
2018	8%	45%	67%	13%	58%	65%	0%	49%	61%
2019	10%	40%	65%	23%	46%	41%	23%	31%	59%
2020	-2%	14%	32%	5%	18%	69%	0%	21%	43%
2022	15%	18%	32%	20%	29%	45%	22%	-2%	33%
2023	5%	15%	49%	11%	21%	46%	12%	40%	82%

Appendix F: Methodology check in 2017

Details of a small concurrent survey using the previous survey method in 2017, to calibrate the revised survey and methodology that has been used from 2017-2023.

Measurement of usage of point-to-point transport services is one of the key purposes of the survey. The change in method for measuring usage from a 'one-step' process of measuring awareness, usage and frequency to an iterative three-step process in 2017 resulted in an apparent discontinuity in the longer-term track. To confirm that underlying trends continued to operate and to assist in calibrating the new methodology to the older data, IPART conducted a small-scale version of the previous methodology concurrently with the new survey in November 2017.

This exercise enabled us to look at data from the two methodologies at the same point in time – represented by the solid vertical line in the chart below. In November 2017 this gave us the confidence to conclude that although the new methodology yields a lower estimate of usage at a weekly and 6-monthly level, the underlying paradigm remained. The addition of the subsequent data using the new methodology confirmed this, with the results showing a continuation of the steady increase in use of rideshare, alongside the more consistent level of use of taxis.

The 2019 survey showed an apparent slowing of the growth of rideshare into the NSW market. In the 2019 report it was speculated that 2020 would reveal more of the relative shape of taxi and rideshare usage. The impact of COVID has interfered with the natural trajectories, but it is clear that in 2020 taxi use declined far more sharply than did rideshare use – but it also bounced back slightly more in 2022. The 2023 data continues to show the stability of the current survey methodology, with both services increasing usage more so than in 2022.